# ***A picture containing text Description automatically generatedPassionate about opera for everyone***

# **Gift of marketable securities**

**Letter of authorization from donor to broker**

To transfer securities to Toronto City Opera, please complete this form and send a copy to your Broker. It is **important that you send us** a copy of this form as well so we can track your donation and send you a tax receipt. Please send a signed copy to **info@torontocityopera.com**

**Please note, all transfers are subject to review, approval and acceptance by Toronto City Opera.**



**A. Donor Information**

**Name**

**Address**

**Phone**

Please select how you’d like to receive your receipt:

☐☐

☐☐

**City Province Postal Code Email**

**Mail**

**Email**

**Signature Date**



**B. Information About Your Broker / Brokerage Account**

**Broker’s Name**

**Broker’s Telephone Number Broker’s Email**



**C. Description of Your Securities to be Donated**

**Number of Shares Name of Security CUSIP#**

**Expected Date of Transfer**

*Please note*

*your tax receipt will be valued as per applicable Canada Revenue Agency*

**Financial Institution Name on Account Account #**

**General operating and production fund**

I would like my gift to be designated where the need is greatest.

**Other Designation**



**D. Account Information for Toronto City Opera**

**Transfer To: Donors:**

**BMO Investorline Please direct all inquiries to Mark Wilson**

**Institution Number: 001 info@torontocityopera.com**

**CUID (Cdn Broker Code): NTDT**

**Dealer Code: 9185**

**DTC Code: 5043**

**Account #: 230-87377**

**Account Name: Toronto City Opera**

MAKE A DONATION IN FOUR EASY STEPS:

1. Obtain this letter of authorization from our website [www.torontocityopera.com](http://www.torontocityopera.com)
2. Complete all sections, most importantly, the CUSIP# which will be provided by your broker or investment advisor which serves as a transaction number in case the transfer needs to be tracked.

For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor/Client Information, including your daytime phone number.

1. Send the completed transfer form to your broker or investment advisor who will initiate, and be responsible for the transfer. If you are using a self-directed brokerage, you will need to call your financial institution and ask them to initiate the transfer. Toronto City Opera is not responsible for the transfer.
2. Notify Toronto City Opera by emailing a copy of the completed letter of authorization to [info@torontocityopera.com](mailto:info@torontocityopera.com)

This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, any appropriate recognition, and your official receipt for income tax purposes.

Note: Your receipt will be valued based on the closing price on the day the shares are legally transferred to the Toronto City Opera’s account at BMO Investorline.