



Gift of Securities

It is easy to donate securities to the Niagara-on-the-Lake Museum. Follow the steps below to support the Museum, which is owned and operated by the Niagara Historical Society.

1. **Complete the Notification of Securities Transfer** (on reverse) and send to Amy Klassen, Director of Finance & Marketing by email at aklassen@nhsm.ca.
2. **Instruct your broker to transfer your securities to the Niagara Historical Society's Brokerage account below. Please do not transfer securities without first sending this form to the Niagara Historical Society/Niagara-on-the-Lake Museum.**
Caldwell Securities Ltd.
437 Mississauga St, Niagara-on-the-Lake, ON L0S 1J0
Contact Person: Jim Caldwell, jcaldwell@caldwellsecurities.com, 905-468-0655
Account #: 565-100 C-A CUIC or DTC Code: CALT
3. **A charitable tax receipt** will be issued for the closing price of the securities on the day of the transfer to the Niagara Historical Society. Eligibility of a tax receipt for the current year requires that securities must be in the Niagara Historical Society's brokerage account by 5 p.m. on December 31st of that year.

GIFT DETAILS

Number of Shares Name of Security

Approximate Amount of Donation

Expected Date of Transfer

YOUR BROKER DETAILS

Broker Name

Financial Institution

Phone Number

Email



Gift of Securities

DONOR DETAILS

Donor Name

Address

Email

Phone Number

Signature

Date

A charitable tax receipt will be issued to the address listed above.

My gift of \$500 or more may be publicly recognized by the Niagara Historical Society:

YES NO

I would like my name to appear as: _____

Your gift is important to us. Please complete this form and send to
aklassen@nhsm.ca Attn: Amy Klassen, Director of Finance & Marketing

Please contact your broker to arrange the share transfer to:

Caldwell Securities Ltd.

437 Mississauga St, Niagara-on-the-Lake, ON L0S 1J0

Contact: Jim Caldwell | 905-468-0655

jcaldwell@caldwellsecurities.com

Account #: 565-100 C-A | CUIC or DTC Code: CALT