



TRANSFER OF SECURITIES FORM

Please complete this form to make a gift of securities to STARS. Detailed instructions are provided on page 2.

Donor information:

Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone #: _____ Email: _____

STARS Foundation Contact (if applicable): _____

Investment advisor/delivering custodian information:

Name of Broker: _____

Broker Phone #: _____ Broker Email: _____

Name of Firm: _____

Account Name: _____ Account Number: _____

Description of securities – Equities/Mutual Funds/Bonds:

I hereby authorize the transfer of the following security/securities to the STARS Foundation Account at BMO Nesbitt Burns:

Security Description: _____ Quantity: _____

CUSIP/ISIN/FUND CODE: _____

Donor Signature: _____ Date: _____

I would like my gift to be used for (if applicable): _____

Delivery of securities:

The security/securities should be transferred by electronic transfers or otherwise in negotiable form (i.e. street name or appropriately endorsed) at the following address:

BMO Nesbitt Burns

Suite 1100, 525 8th Avenue SW, Calgary, AB T2P 1G1

The Shock Trauma Air Rescue Service Foundation Account #705-47321-15

Delivery should be made to: BMO Nesbitt Fins #T009

CUID is NTDT; DTC is 5043 Dealer Code: 9185 Rep Code: QJN

Charitable Registration No. 81845 9521 RR0001

Important note: STARS works diligently to recognize donations from our allies. By notifying our Legacy Giving team of the completion of this form, we can ensure timely recognition of your generous legacy gift while expediting processing of a charitable tax receipt. Without receipt of the form, we are unable to confirm the donor and unable to issue a tax receipt.



Gifts of listed securities

Favourable tax rules regarding the donation of listed securities to a charity make this a particularly attractive option for many donors. A gift of securities (stocks, bonds, mutual funds, etc.) provides an innovative and creative way to support STARS and can often help fund a larger gift than you might otherwise be able to make. You can eliminate the capital gains tax on listed securities that are donated to a registered charity.

We recommend you speak with your tax advisor, accountant and/or financial planner before considering a gift of listed securities. Potential legal considerations and tax benefits may vary based on your province of residence.

Instructions for donating a gift of securities:

1. Complete the Transfer of Securities Form (page 1 of this document) with your broker and send it both to BMO Nesbitt Burns and STARS Foundation by email or fax:

BMO Nesbitt Burns

Attn: Lily Briggs

Tel: (403) 261-9535 Fax: (403) 260-9379

Email: Lily.Briggs@nbpcd.com

STARS Foundation

Attn: Your STARS contact and/or Miriam Moisan

Tel: (780) 890-3159 Fax: (780) 890-3180

Email: mmoisan@stars.ca

2. Instruct your broker/delivering custodian to initiate the transfer upon completion of this form providing your authorization and the specifics of your donation of securities.
3. A charitable tax receipt will be issued for the value of the securities transferred as determined at the end of the trading day on the day the securities are received.