



# Gift of Securities

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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.

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1. **Complete the Notification of Securities Transfer** (on reverse) and send to Amy Klassen, Director of Finance & Marketing by email at [aklassen@nhsm.ca](mailto: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](mailto: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 and CUSIP

\_\_\_\_\_  
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](mailto: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](mailto:jcaldwell@caldwellsecurities.com)

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