



# Stock Transfer Initiation Form

(This form is to be used by donors to initiate a donation of stock to the Ottawa Jewish Community Foundation or Jewish Federation of Ottawa)



## Support Jewish Ottawa in just 3 steps...

### Step 1

Complete all sections of this form. This can be done with your broker/advisor.

### Step 2

Send this completed form to Micah Garten at the address below. Security/Funds are transferred anonymously. Sending us this completed form will ensure you receive an official tax receipt.

### Step 3

Email or fax the completed form to your broker/advisor.

I, \_\_\_\_\_ hereby authorize  
(Donor)

my broker \_\_\_\_\_ to transfer stock  
(Broker name and address)

to the **Ottawa Jewish Community Foundation** as outlined below:

Donor \_\_\_\_\_

Date \_\_\_\_\_ Donation Amount \_\_\_\_\_

Description of Stock \_\_\_\_\_

Number of shares to be transferred \_\_\_\_\_

Donation to: *(please circle one of the options below)*

Jewish Federation  
of Ottawa

Ottawa Jewish  
Community Foundation

I have provided instructions  
to Micah Garten regarding the  
disbursement of funds.

Transfer to:

**Ottawa Jewish Community Foundation**

C/O BMO Nesbitt Burns

Account #49005811-19

CUID: NTD-5043

Contact: Lawrence Pleet (613) 562-6415 (lawrence.leet@nbpcd.com)  
or Stephanie Lomuto (613) 562-6478 (stephanie.lomuto@nbpcd.com)

Donor Signature \_\_\_\_\_

Date \_\_\_\_\_

NOTE: Failure to provide sufficient details on this letter may result in failure to settle.

Please use a separate form for each Security.

Please direct any inquiries to:

**Micah Garten**, Director of Development  
Ottawa Jewish Community Foundation  
21 Nadolny Sachs Pvt.  
Ottawa, ON K2A 1R9  
Phone: (613) 798-4696 x270  
Email: mgarten@jewishottawa.com

*Thank you  
for ensuring a vibrant  
Jewish community.*