



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 Michael Reznick 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.

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

Please use a separate form for each Security.

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
Michael Reznick regarding the
disbursements of funds.

Transfer to:

Ottawa Jewish Community Foundation

C/O BMO Nesbitt Burns

Account #49005811-19

CUID: NTDT-5043

Contact: Lawrence Pleet (613) 562-6415 (lawrence.pleet@nbpcd.com)

or Stephanie Lomuto (613) 562-6478 (stephanie.lomuto@nbpcd.com)

Donor Signature _____

Date _____

Please direct any inquiries to:

Michael Reznick

Vice President, Development

Jewish Federation of Ottawa &

Ottawa Jewish Community Foundation

21 Nadolny Sachs Pvt.

Ottawa, ON K2A 1R9

Phone: (613) 798-4696 x272

Email: mreznick@jewishottawa.com

*Thank you for ensuring
a vibrant Jewish community.*