MEI Ideas for a More Prosperous Society

Charitable Donation of Securities in Kind

(required to issue the official tax receipt)

How to complete this form

1. Complete Sections A to C and sign at the bottom of the form.
2. Complete and email a copy of this signed form to the Montreal Economic Institute at cfiset@iedm.org and to our broker BMO Nesbitt Burns (thomas.romary@nbpcd.com) so we ensure proper receipt of your gift.
3. Send the completed form to your broker so they can initiate the transfer to the account shown in Section D.

A. Donor Information

Full name _____

Address _____

City _____ **Province** _____ **Postal code** _____

Telephone _____

Email _____

Note: completing this form alone does not transfer the securities. Your broker must initiate the transfer.

B. Donor's Delivering Institution

Firm name _____

Broker name _____

Account name _____

Account number _____

Delivering CUID _____

Telephone _____

Email _____

C. Securities Being Donated

Quantity	Name of security	CUSIP	Approx. value

D. Receiving Institution – Transfer Settlement Instructions

Canadian securities

Eligible Canadian securities are transferred electronically through the Canadian Depository for Securities (CDS) to BMO Nesbitt Burns using the following information:

Delivering to: BMO Nesbitt Burns
Account name: Institut Économique de Montréal
Account number: 330-32461-14
CUID: NTDT

U.S. securities

U.S. securities are transferred through DTC for the account of BMO Nesbitt Burns using the following information:

Delivering to: BMO Nesbitt Burns
DTC number: 5043
Account name: Institut Économique de Montréal
Account number: 330-32461-14

BMO Nesbitt Burns contact

Contact name: Edward Berry, Portfolio Manager / Thomas Romary, Client Services Associate
Telephone: 514-286-3534 / 514-286-8281
Email: edward.berry@nbpcd.com / thomas.romary@nbpcd.com

Donor signature **Date**

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