SHAW FESTIVAL US GIFTS OF SECURITIES FORM - LEGACY

Canadian Charitable Registration No.
119147882 RR 0001
IRS (USA) Charitable ID No.
U.S. Section 501(c)(3) 22-2809351

This form should be completed by the donor or an associated broker or financial advisor.

Please be advised that the following transfer is about to be made to the Shaw Festival Foundation through its account with **Trubee Wealth Advisors.**

Securities Transfers by DTC	Federal Reserve Wire Transfer
DTC No.: 0141 Shaw Festival Foundation Account No.: 72527927 Clearing Agent: First Clearing LLC Firm Name: Trubee Wealth Advisors Firm Contact: Michael Sheets at 716-849-1475 or or Harrison Steinwald at 716-849-1474 Firm Contact Phone No.: (716) 849-1401	Name of Bank: Wells Fargo Bank Address of Bank: 420 Montgomery Street, San Francisco, California 94104 Beneficiary: First Clearing LLC Account No. 4122023377 Further Credit to Shaw Festival Foundation Account No. 72527927 ABA No.: 121000248

The Donor hereby irrevocably assigns ownership of the securities or funds identified below to the Shaw Festival Foundation. Upon receipt, the Shaw Festival Foundation will issue written substantiation as described in §170(f)(8) of the Internal Revenue Code. The Donor understands that it is the policy of the Shaw Festival Foundation to sell donated securities at the first available opportunity.

NAME: **PHONE (DAY):**

ADDRESS:

EMAIL:

NAME OF BROKER: **FIRM:**

BROKER PHONE: **BROKER FAX:** **DONATION DATE:**

NAME OF SECURITY: **NUMBER OF SHARES:**

DESCRIPTION OF SHARES (COMMON, PREFERRED, MUTUAL FUND UNITS):

STATE PURPOSE OF GIFT:

SIGNATURE OF DONOR: _____

NAME: **DATE:**

By this signature I hereby instruct my broker to complete the transfer to the Shaw Festival Foundation.

The Donor's broker or bank is asked to contact Michael Sheets at 716-849-1475 or Harrison Steinwald at 716-849-1474 or by fax at 716-849-0144 to give notice of this transfer.

For information purposes, and to help facilitate the transfer, please email this form to Kim White, Associate Director, Individual & Legacy Giving at kwhite@shawfest.com or fax it to the Shaw Festival, Attn: Kim White at 905-468-7140.

The Doherty-Rand Legacy Circle