Gift of Stock Instructions

**Step 1**

*Instruct your broker to make the transfer to:* BMO Nesbitt Burns

**Account name:** Dave Thomas Foundation for Adoption

**Account number:** 430-15043-14 N44

**CDS/CUID:** NTDT

**FIN#:** T009

**Step 2**

Ask your broker to notify the Foundation’s BMO contact when the transfer takes place:

**BMO Nesbitt Burns**

80 King Street, Suite 600

St. Catharines, ON

L2R 7G1

**Attention:** William Maier

**E-mail:** William.Maier@nbpcd.com

**Phone:** 905-685-6775

**Fax:** 905-685-6272

**Step 3**

Please contact Dan Shook, Chief Financial Officer, at Dan_Shook@davethomasfoundation.org or 614-764-6882 to share the following information:

- Name of your broker's company
- Name of stock the Foundation’s broker should expect
- Number of shares being transferred
- Approximate date of expected transfer
- Purpose of the gift (if applicable)