

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 Chip Spires, SVP, Chief Financial Officer, at chip.spires@davethomasfoundation.org or 614-350-4736 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)