



PUBLICLY TRADED SECURITIES — CANADA

GIFTS OF STOCK TO THE ROTARY FOUNDATION (CANADA)

Thank you for your interest in making a gift of securities to The Rotary Foundation (Canada). Please note that your stock will be valued at the average of the high and low prices on the date of gift - this is the date that the shares are legally transferred to The Rotary Foundation (Canada)'s account at RBC Dominion Services. **Please inform The Rotary Foundation in advance of your intent to gift securities by completing the attached Notice of Transmittal.**

1. **Complete the Notice of Transmittal of Gift Securities on page 2.** Please fax, email or mail a copy of the completed form to:

Gift Administration
 The Rotary Foundation
 1560 Sherman Avenue
 Evanston, IL 60201 USA
 Fax: 847-556-2181
 Email: giftadministration@rotary.org

2. **Send the Letter of Intent on page 3 to initiate the electronic transfer with your broker.** Your broker is responsible for initiating the transfer of securities using the information provided on the Letter of Intent. Your broker may have its own form, but the Letter of Intent has the information your broker will need. Once the transfer is complete The Rotary Foundation (Canada) will issue a charitable tax receipt.

Certificate Transfer

Stock certificates may be transferred to The Rotary Foundation (Canada). Before transferring a physical stock certificate, please contact Gift Administration at The Rotary Foundation at 847-866-3380 or giftadministration@rotary.org.

Additional Contact Information

Broker:

RBC Dominion Services Inc.

Contact:

John Stairs, RBC Associate

Direct line: 905-332-2588

Toll-free: 800-668-6285

Email: john.stairs@rbc.com

Vicky Perez

Sr. Gift Administration Specialist

The Rotary Foundation

Ph: 847-866-3401

vicky.perez@rotary.org

Carolyn Ferguson

Major Gift Officer — Canada

The Rotary Foundation

Ph: 905-304-6831

carolyn.ferguson@rotary.org



NOTICE OF TRANSMITTAL OF GIFT OF SECURITIES

GIFTS OF STOCK TO THE ROTARY FOUNDATION (CANADA)

My gift is worth approximately \$ _____.

- I have notified my broker to wire transfer _____ shares of _____ stock.
 _____ Company/Symbol
- I have sent a physical certificate via certified mail to Gift Administration/The Rotary Foundation:
 _____ shares of _____ stock on _____, 201____.
 _____ Company/Symbol _____ Date

The completed stock power form was sent under separate cover via certified mail.

- I would like to speak with someone about giving a stock gift. Please call me at: _____

Please direct my gift to:

- | | |
|---|---|
| <input type="checkbox"/> Annual Fund — SHARE | <input type="checkbox"/> Endowment Fund — SHARE |
| <input type="checkbox"/> Annual Fund — World Fund | <input type="checkbox"/> Endowment Fund — World Fund |
| <input type="checkbox"/> PolioPlus | <input type="checkbox"/> Rotary Peace Centers |
| <input type="checkbox"/> Other | <input type="checkbox"/> Endowment Fund — Area of Focus |
| _____ | _____ |

Name: _____

Address: _____

Phone: _____ Email: _____

Rotary Club: _____ District: _____

Foundation Donor ID # (if known): _____

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