



**Direction to Transfer Ownership of Mutual Funds held at
Financial Planning and Mutual Fund Companies to Casey House Foundation**

TO: _____

FINANCIAL COMPANY/AGENT: _____ ACCOUNT#: _____

You are hereby directed to transfer the following mutual fund(s) from my account held with you as a charitable gift-in-kind:

Number of Units	Mutual Fund Name
_____	_____
_____	_____
_____	_____

FOR DEPOSIT TO:

Account #: 230-02876-18
FINS #T009
CUID: NTD (for Canadian Securities)

BMO Investorline
1st Canadian Place
100 King Street W., Toronto, ON M5X 1H3
Attn: Support Team
Fax: 416-359-5607
Phone: 1-888-776-6886

For: "Casey House Foundation" Account number #230-02876-18

YOU ARE FURTHER DIRECTED:

- to execute this transfer as expeditiously as possible
- to provide the mutual fund company with all documentation required to re-register these units
- to acknowledge receipt of this instruction by faxing a signed copy of this form to 416-359-5607 (Attn: Support Team)

I authorize Casey House Foundation or its agent to contact my broker for purposes concluding this transaction.

Date

Signature of Donor

Print Name

Date

Signature of Guarantor
(Stamped by Bank or Notary Public)

I acknowledge receipt of this direction to transfer and confirm initiation of the re-registration of the mutual fund units in the name of Casey House Foundation, and have a) faxed a signed copy of this form to 416-359-5607 (Attn: Support Team)

Mutual Fund Company

Signature

Date, Phone Number and Extension

Print Name

SPECIAL INSTRUCTIONS:

To ensure that donor(s) can be issued proper charitable donation receipts, mutual fund units held at the fund company must be signature guaranteed for Casey House Foundation to accept these units. Please e-mail or fax a completed form to Casey House Foundation at thatten@caseyhouse.ca or 416-975-1363, attention Tracy Hatten. If you have any questions, please contact Tracy Hatten, Senior Development Officer, Major Gifts and Planned Giving at 416-962-4040 ext. 4003.