



Security Donation Form

Date: _____

Description of Donation

Security: _____ Quantity: _____

Security: _____ Quantity: _____

Donate to: Congregation Beth Israel

Account Number E86-9568-A

Your Personal Information

Name: _____

Address: _____

Telephone: _____ Email: _____

Your Broker's Information (Delivering Institution)

Broker's Name: _____ Company: _____

Telephone: _____ Email: _____

Transfer Instructions

Receiving Institution: Fidelity Clearing Canada (on behalf of Echelon Wealth Partners)

CUID #FIDC Dealer# 7862

Donor Signature: _____

(signature means I have instructed my broker to initiate transfer of securities)

Please email this form to Indi Shoker at ishoker@echelonpartners.com. Should you require any assistance, please feel free to contact Indi at (604) 647-2855.

IMPORTANT: In the absence of notifying Echelon Wealth Partners of your donation by providing them with a copy of this form, proper receipt, sale and credit of your donation cannot be guaranteed. Physical delivery of securities will not be accepted.