

Trinity United Church “In Kind” transfer instructions:

- 1. Contact your broker/advisor and tell them that you wish to transfer “In Kind” a certain number of shares (if stocks), bonds or units (if mutual funds) to Trinity United Church’s account at the Nesbitt Burns office in Cobourg.

BMO Nesbitt Burns
17 King St. E., Cobourg, ON K9A 1K6
Phone: 905-373-1507
Fax: 905-373-9331
FINS #T009 – CUID: NTDT DTC:5043
Trinity’s account # is 530-05786-13

- 2. Complete the bottom section of this page and return it to Trinity’s office so that they are aware that the transfer is coming. That will ensure you receive the appropriate tax receipt. Also, by completing the form below, you will be able to clearly specify how the contribution is to be allocated.

Thank you for your support.

To Trinity United Church:

I am in the process of transferring some on my investments “in kind” to Trinity.
General information, such as the approximate amount or number of shares, etc. follows:

Please use these funds however you feel is most appropriate: _____ (Check here)

OR

Please use these funds to cover expenses as follows: \$\$\$ or %

General Fund _____
Capital Fund _____
Mission & Service _____
Debt Reduction _____

Other instructions: _____

Name (please print)

Address

Signature

Date