CANADA GIVES

FOUNDATION ACCOUNT

Charitable Donation of Securities in Kind

Please complete this form as authorization to Canada Gives to facilitate a timely transfer. If delivering physical certifcates please attach a copy of this form with the physical certificates.

Foundation Account Name _____ Foundation Account Number _____

☐ Initial Donation ☐ Additional Donation ☐ Third Party Contribution (see over)

Delivering Institution Information

Name *(of Institution):* _____

DTC# _____ and CUID# _____

Account Name: _____

Account Number: _____

ContactName: _____

Contact Phone Number: _____

Email: _____

Receiving Institution Information

Name *(of Institution):* _____

DTC# _____ and CUID# _____

Account Name: _____

Account Number: _____ ☐ CAD ☐ USD

Contact Name: _____

Contact Phone Number: _____

Email: _____

PLEASE TRANSFER THE FOLLOWING SECURITIES TO CANADA GIVES

☐ As listed below ☐ List attached

In Kind donations of securities to Canada Gives can include shares in public companies, units of mutual funds or bonds. If you are donating bonds, please include interest rate and maturity.

Important Information Regarding Securities Donations

- The fair market value for the donation tax receipt is the closing market price on the day the securities are received by Canada Gives, and not the value on the date the transfer is requested
- Securities are generally not sold until transfer documentation has been received confirming they have left the donor's investment account. Market values may fluctuate during this time. Canada Gives will not monitor the security's performance in order to determine when to sell the position.

I acknowledge that I have read and understood the tax and valuation information described above regarding this securities donation. _____ Initials

	Security Description	Symbol and/or Certification No. or Policy No.	Quantity
☐ Shares/Units ☐ Bonds			
☐ Shares/Units ☐ Bonds			
☐ Shares/Units ☐ Bonds			

FINANCIAL DIRECTION AND SIGNATURE SECTION

I hereby give this donation absolutely to Canada Gives, a registered charity in Canada, as a gift to be distributed as follows:

_____% to be used for TODAY's immediate needs. Funds are to be held in cash or a short-term investment account and disbursed to registered charities upon the request of the donor.

_____% to be used for long-term support to meet TOMORROW's needs. These funds are directed as an "Endowment Gift" that will be invested and provide sustainable funding with annual grants to registered charities every year.

It is understood that an Endowment Gift is intended to be a permanent fund. Notwithstanding that intention, upon my direction in writing and as permitted by and subject to the law from time to time, Canada Gives shall disburse all or part of the amount held in this Foundation account to another registered charity under the *Income Tax Act* (Canada) less the applicable administration fees charged by Canada Gives from time to time. Subject to this Direction of Donation, Canada Gives may apply for its charitable purposes such portion of the income, capital gains and original capital of the Endowment Gift or property substituted for it (whether realized or accrued) as is permitted by law from time to time.

▶ _____ _____

Signature (Contributor's Signature) Date (dd/mm/yyyy)

THIRD PARTY DONOR INFORMATION *(if applicable)*

All information collected for third party donors is used for the purposes of informing the account holder,processing your donation and issuing an official donation receipt in compliance with Canada Revenue Agency policies.

☐ Mr. ☐ Mrs. ☐ Miss ☐ Ms. ☐ Dr. ☐ Corporation

First Name | Initial | Last Name

Address

City | Province | Postal Code

( )

Phone Number | Citizenship | Residency

09/26

CANADA GIVES