



## Donations of Publicly Traded Securities to Parishes in the Diocese of Edmonton

In order to initiate your gift transfer, please complete this form and fax it to your broker (the delivering institution). Your broker will be able to provide the CUSIP and CUID numbers.

Your broker needs to fax this form to **Steven Kim** or **Joanne Makila** at 780-424-7153 AND The Diocese of Edmonton at 780-439-6549.

Your broker may contact **Steven Kim** at RBC at 780-409-5355 or by email at [steven.kim@rbc.com](mailto:steven.kim@rbc.com) or **Joanne Makila** at RBC at 780-409-5353.

RBC must receive the securities in its account before the securities can be valued and a charitable tax receipt issued.

Unexpected and/or unidentifiable transfers may make it difficult for the Diocese to issue the appropriate tax receipt and to forward the proceeds to the correct parish. Please contact **The Ven Alan Perry, Executive Archdeacon** at 780-439-7344 with any questions about the gift of securities transfer process.

### Name and Contact Details of Donor's Broker/Delivering Institution (DI)

**TO:** \_\_\_\_\_  
Name of Donor's Brokerage/Delivering Institution

Attention: \_\_\_\_\_  
Name of Contact Person at Donor's Brokerage/Delivering Institution

CUID#: \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_  
(Broker/DI to complete)

Client Account Number: \_\_\_\_\_

### Donor/Client Information

**FROM:** \_\_\_\_\_  
Name of donor/client for charitable tax receiving purposes

Full Address: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

### Instructions from Donor to Donor's Broker/DI

I hereby give authority to deliver free as a charitable gift the following securities to **RBC Dominion Securities (CUID# DOMA)** to the attention of **Steven Kim** for credit to account # **731-44022-10** in the name of **Synod of the Diocese of Edmonton**, CRA Charitable Registration # 10806 1441RR0001.

Full Name of Security: \_\_\_\_\_ CUSIP #: \_\_\_\_\_  
(Broker/DI to complete)

Market Symbol: \_\_\_\_\_ Number of Shares/Units to transfer: \_\_\_\_\_  
(Donor or Broker/DI to complete)

### Authorization of Donor/Client

\_\_\_\_\_  
Signature Day Month Year

### Gift Designation Instructions from Donor to Diocese of Edmonton

Please send my gift to: \_\_\_\_\_  
Name of Parish

OR

Use my gift for: \_\_\_\_\_  
(Please Specify)

**Cc: Diocese of Edmonton, fax: 780-439-6549**  
**Cc: RBC, Joanne Makila, fax: 780-424-7153**