

Donation of Publicly Listed Securities to the Victoria Foundation

Thank you for your interest in donating securities to the Victoria Foundation. A gift of publicly listed securities, such as stocks, bonds or mutual funds, can be made to the Foundation.

Transferring securities is very easy to do; simply follow these instructions:

1. Complete and deliver pages 2 and 3 of this document to your broker or financial advisor in order to carry out your instructions with regard to making a gift of securities to the Victoria Foundation. You may need your broker's assistance to complete this form or, if we can be of assistance to you, please call us at 250.381.5532.
2. Your broker should contact our broker, CIBC Wood Gundy, and send both this form and the securities directly to them. In addition, they should send a copy of the completed form to Sara Neely at the Victoria Foundation. **Please note the Victoria Foundation cannot initiate a transfer of shares – the request must be made through your broker.**
3. Once the securities have been transferred to the Foundation's brokerage account, CIBC Wood Gundy will advise us in writing of the receipt of the securities and the closing market value on the day the securities were received into our account.
4. We will issue an official receipt to you, for income tax purposes, for the value as determined by CIBC Wood Gundy.
5. It is the Foundation's policy that securities, once received by the Foundation, are sold and allocated pursuant to the donor direction on page 3.

Once again, we thank you for supporting our community. If you have any questions, please contact:

SARA NEELY, DIRECTOR OF PHILANTHROPIC SERVICES
sneely@victoriafoundation.bc.ca

Victoria Foundation
200 – 703 Broughton Street
Victoria, BC V8W 1E2

P: 250.381.5532
F: 250.480.1129

Donation of Publicly Listed Securities to the Victoria Foundation

BROKERAGE INFORMATION

DATE: _____

TO: Delivering Firm (Donor's Broker) _____

Branch _____

Address _____

Name of Broker _____ Phone _____

Email _____ Fax _____

FROM: Name of Donor _____

Account # _____

Address _____

Phone _____ Email _____

PLEASE TRANSFER THE FOLLOWING SECURITIES IN KIND TO THE BROKERAGE ACCOUNT OF THE VICTORIA FOUNDATION:

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

SECURITIES FOR THE BENEFIT OF THE VICTORIA FOUNDATION MAY BE RECEIVED INTO THE FOLLOWING ACCOUNTS:

ACCOUNT NAME: VICTORIA FOUNDATION
ACCOUNT #: 821-05368-12

CIBC TRANSFER DEPARTMENT
Brookfield Place P.O. Box 500
161 Bay Street, 4th Floor
Toronto ON M5J 2S8
Contact: Anna Veltri
P: 250.361.2237
E: anna.veltri@cibc.ca

US SECURITIES
DTC: 5030
ABA: 021000018
Dealer: 9280

EURO SECURITIES
Euroclear: 10034
BK OF NYC/WGI
ABA: 021000018
Dealer: 9280

CANADIAN SECURITIES AND MUTUAL FUNDS
CUID: WGDB
Dealer: 9280

Donation of Publicly Listed Securities to the Victoria Foundation

DONOR DIRECTION (TRANSFER TO THE VICTORIA FOUNDATION)

Charity Business Number 13065 0898 RR0001

GIFT TO THE VICTORIA FOUNDATION FOR THE:

_____ Fund (if applicable)

PLEASE DIRECT MY GIFT AS A:

Please choose one of the following:

- ☐ I wish for the full value of my gift to be added to the capital of the fund.
- ☐ I wish for the full value of my gift to be for pass-through granting purposes.
- ☐ I wish for \$_____ of my gift to be added to the capital of the fund, with the remainder for pass-through granting purposes.
- ☐ I wish for \$_____ of my gift to be for pass-through granting purposes, with the remainder to be added to the capital of the fund.

For Pass-Through Gift: ☐ I will provide my grant recommendations later. ☐ Grant as listed below.

Charitable organization(s): (Be sure to include a +/- on one of your grant recommendations to account for the fluctuation in sale value. Please also include purpose, if other than area of greatest need.)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

☐ I wish to remain ANONYMOUS to the recipient(s).

Donor's signature _____ **Print name** _____

Please note: all grants from pass-through gifts may be subject to a 1% fee and must be approved by the Foundation's Board of Directors. Grants may take up to 30 days to reach the charitable organization(s).

PLEASE FAX OR EMAIL A COPY OF PAGE 2 AND PAGE 3 OF THIS FORM TO START THE PROCESS FOR YOUR DONATION:

1. VICTORIA FOUNDATION AT: 250.480.1129

Victoria Foundation Contact:

Sara Neely, Director of Philanthropic Services
200 – 703 Broughton Street
Victoria, BC V8W 1E2
P: 250.381.5532 F: 250.480.1129
E: sneely@victoriafoundation.bc.ca

2. TO OUR BROKER AT: 250.361.2270

Broker Contact:

Anna Veltri
Financial Associate
CIBC Wood Gundy
P: 250.361.2237 F: 250.385.5669
E: anna.veltri@cibc.ca