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Charitable Business Number: 119278224RR0001

Donation Of Publicly-Traded Securities To United Way Southern Vancouver Island

Thank you for your charitable donation of securities to United Way Southern Vancouver Island. The following instructions are easy to follow in order to process your gift:

1. Please notify United Way of your intention to donate securities by emailing a copy of this document, please also provide a copy to your broker or advisor. Your broker can assist you in completing this form or United Way can do so.
2. Your broker or advisor will arrange for the transfer of securities to the United Way’s account. If your broker needs further information to complete the transfer, he/she should contact United Way.
3. Once the securities have been transferred to United Way’s account, our broker will advise us of the receipt of the securities and the closing market value on the day the securities were received into our account. We will issue a receipt to you for income tax purposes with the donation amount equal to the transfer date’s closing market value.
4. If some of this donation is being designated to another agency, a cost recovery fee will apply per designation gift in the amount of 10% to the maximum of \$100 per designation.

1

United Way Southern Vancouver Island contact information:

Director of Finance & Operations at 250-220-7357 or by email finance@uwsvi.ca

Date _____

2

Brokerage Information:

Delivering Firm (Donor’s Broker) _____

Address _____

Name of Broker _____ Phone _____

Email _____ Client Account Number _____

Donation From:

Name of Donor _____

Address _____

Phone _____ Email _____

3. Please transfer the following securities in kind to the brokerage account of United Way Southern Vancouver Island:

_____ shares of _____
(Number of shares) (Name of security)

_____ shares of _____
(Number of shares) (Name of security)

Approximate Value of Shares \$ _____

4. United Way Brokerage Information:

Securities for the benefit of United Way Southern Vancouver Island may be received into the following account:

RBC Phillips Hager & North Investment Counsel Account #46305290-16
CUID code is DOMA
DTC code is 5002

5. Acknowledgement of Your Gift

Leadership Recognition Your gift may distinguish you as a United Way Leader online. May we recognize your donation? Yes No

If yes, please print name(s) as you would like it to appear. _____

6. Donor Signature _____