

# Donation of Publicly Listed Securities to the Victoria Foundation for the benefit of Cowichan Hospice

*Thank you for your interest in donating securities to the Victoria Foundation for the benefit of Cowichan Hospice. A gift of publicly listed securities, such as stocks, bonds or mutual funds, can be made to the Foundation who, following processing of the transfer, will issue a tax receipt and then pass the gift through to Cowichan Hospice.*

*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 to benefit Cowichan Hospice. 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 Victoria Foundation's 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 **Holly Bowen** at Cowichan Hospice and 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 the Foundation in writing of the receipt of the securities and the closing market value on the day the securities were received into their brokerage account.
4. The Victoria Foundation 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:*

**HOLLY BOWEN, COWICHAN HOSPICE, DEVELOPMENT COORDINATOR**

[holly@cowichanhospice.org](mailto:holly@cowichanhospice.org) or

**SARA NEELY, VICTORIA FOUNDATION, DIRECTOR OF PHILANTHROPIC SERVICES**

[sneely@victoriafoundation.bc.ca](mailto:sneely@victoriafoundation.bc.ca)

Victoria Foundation P: 250.381.5532  
200 – 703 Broughton Street F: 250.480.1129  
Victoria, BC V8W 1E2

Cowichan Hospice P: 250.701.4242  
3122 Gibbins Road F: 250.701.4243  
Duncan, BC V9L 6M7

# Donation of Publicly Listed Securities to the Victoria Foundation to benefit Cowichan Hospice

## 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](mailto: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

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## DONOR DIRECTION (TRANSFER TO THE VICTORIA FOUNDATION)

Charity Business Number 13065 0898 RR0001

### GIFT TO THE VICTORIA FOUNDATION FOR THE:

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#### 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 must be approved by the Foundation's Board of Directors. Grants may take up to 30 days to reach Cowichan Hospice.

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

1. COWICHAN HOSPICE AT: 250.701.4243    2. VICTORIA FOUNDATION AT: 250.480.1129    3. OUR BROKER AT: 250.361.2270

Cowichan Hospice Contact:  
Holly Bowen, Development Coordinator  
3122 Gibbins Road  
Duncan, BC V9L 1G2  
P: 250.701.4242 F: 250.701.4243  
E: [holly@cowichanhospice.org](mailto:holly@cowichanhospice.org)

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](mailto:sneely@victoriafoundation.bc.ca)

Broker Contact:  
Anna Veltri  
Financial Associate  
CIBC Wood Gundy  
P: 250.361.2237 F: 250.385.5669  
E: [anna.veltri@cibc.ca](mailto:anna.veltri@cibc.ca)