

**Donations of Publicly Traded Securities to**

**Parishes in the Diocese of Edmonton**

|  |  |
| --- | --- |
| *To initiate your gift transfer, please complete this form and send it to your broker (the delivering institution). Your broker will be able to provide the CUSIP and FINS numbers.*  *Your broker needs to send this form to:*  ***Investors Group Securities Inc., External Transfers-In Department:***  ***FAX: 1-866-202-1923 or***  ***EMAIL:***[*transfer-in@ig.ca*](mailto:transfer-in@ig.ca) *AND*  ***The Diocese of Edmonton*** *at* ***FAX:******780-439-6549 or***  ***EMAIL:*** [***treasurer@edmonton.anglican.ca***](mailto:treasurer@edmonton.anglican.ca)  *Your broker may contact* ***IG Wealth at*** [***transfer-in@ig.ca***](mailto:transfer-in@ig.ca)  ***IG Wealth*** *must receive the securities in its account before the securities can be valued and a charitable tax receipt issued.*  *Unexpected and/or unidentifiable transfers make it difficult for the Diocese to issue the appropriate tax receipt and to forward the proceeds to the correct parish. Please contact* ***John Gee, Secretary-Treasurer*** *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  FINS#: Telephone ( ) Fax ( )  (Broker/DI to complete)  Client Account Number:  **Donor/Client Information**  **FROM:**  Name of donor/client for charitable tax receipting 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:  **Investors Group Securities Inc. (DTC: 5008, CUID: NBCS, FINS: T080)**  for credit to **account IG221004286** 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: Investors Group Securities Inc., fax 1-866-202-1923 or email** [**transfer-in@ig.ca**](mailto:transfer-in@ig.ca) |