

**Donations of Publicly Traded Securities to**

**Parishes in the Diocese of Edmonton**

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| ***To initiate your gift transfer, please complete the following steps:*** 1. *Complete this form and send it to your broker - the delivering institution.. (Your broker will be able to provide the CUSIP and FINS numbers).*
2. *Please also send via email to The Diocese of Edmonton at email:* ***treasurer@edmonton.anglican.ca***
3. *Your broker(Delivering Institution) must send this form to* ***both****:*

 ***Investors Group Securities Inc., External Transfers-In Dept:*** ***EMAIL:****transfer-in@ig.ca* *or****FAX: 1-866-202-1923***  ***AND*** ***IG Wealth Advisor for the Diocese of Edmonton - Brent Seib at EMAIL:*** ***brent.seib@ig.ca***1. ***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.* ***Questions:*** *Please contact Diocese of Edmonton Treasurer* ***John Gee 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 InstitutionAttention: Name of Contact Person at Donor’s Brokerage/Delivering InstitutionFINS#: Telephone ( ) Fax ( )  (Broker/DI to complete)Client Account Number: **Donor/Client Information****FROM:** Name of donor/client for charitable tax receipting purposesFull 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 ParishORUse my gift for:  (Please Specify) |