

**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*](mailto: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***](mailto: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 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) |