



**GIFT OF PUBLICLY TRADED SECURITIES TO**  
**The United Church of Canada Foundation/ Fondation de l'Église Unie du Canada**  
 (Reg. Char. #863109021 RR0001)

It is my intention to make a gift of publicly listed securities to The United Church of Canada Foundation/Fondation de l'Église Unie du Canada with the request that it be directed to registered charitable organizations of my choosing.

- I understand that to initiate my gift, I must send this form to my broker. My broker will then send the completed transfer form to his/her back office to initiate the gift of securities.
- I will fax, email, or mail a completed copy of this form at 416-231-3103 or [jsmith@united-church.ca](mailto:jsmith@united-church.ca) to confirm that the transfer instructions have been issued. This is a courtesy copy only and does not initiate the transfer.
- These securities have been donated to The United Church of Canada Foundation/Fondation de l'Église Unie du Canada without restriction and can be sold by the Foundation at any time considered appropriate.
- I understand that I will receive a charitable tax receipt from the Foundation. As per Canada Revenue Agency regulations, the tax receipt will reflect the closing value of the shares/units on the day the Foundation receives them.
- I am aware that the Foundation's discount broker charges \$9.95 per sale of shares.
- I am aware that the Foundation will charge a fee of 1.5% (to a maximum of \$250) to cover the costs of administering your gift.

**Details of the Foundation's Account:**

**RBC Direct Investing**

Royal Bank Plaza  
 200 Bay Street, North Tower  
 P.O. Box 75  
 Toronto, ON M5J 2Z5  
 RBC Direct Investing account #680 488-72-11  
 FINS #: T002 (if required)  
 DTC#: 5002 CUID#: DOMA  
 Dealer Participation #: 9190  
 Trading line: 1-800-769-2560

**The person to help you at The United Church of Canada Foundation is:**

Jessica Smith  
 416-231-5931, ext. 2021;  
 Toll free 1-866-340-8223;  
 Fax: 416-231-3103  
[jsmith@united-church.ca](mailto:jsmith@united-church.ca)  
 Suite 200, 3250 Bloor St. W.  
 Toronto, ON M8X 2Y4

[www.unitedchurchfoundation.ca](http://www.unitedchurchfoundation.ca)  
 200-3250 Bloor St. W, Toronto, ON M8X 2Y4  
 866-340-8223 | [fdn@united-church.ca](mailto:fdn@united-church.ca)

**Information (For Tax Receipt Purposes):**

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Name(s)

Date

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Mailing Address

**Description of Securities:**

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Name of Securities

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Number of Units/Shares

Approximate Value

**Broker:**

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Donor's Broker's Name/Brokerage Account Number

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Address of Donor's Broker

**Donor's Signature:**

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**Donor's Telephone/E-mail:**

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**I wish my name to appear in correspondence as (eg. Mrs. Jane Smith):**

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I wish to make my gift anonymously

I request the gift of publically traded securities be directed to:

Name & Address of Organization	Amount or Percentage	Special Instructions

**\* At least one United Church of Canada institution must be named, and there is a \$300 minimum on each gift.**

I also wish to make a gift to the Foundation of \$\_\_\_\_\_ as a donation:

- To where it is needed most
- For peace, justice, & environmental work
- For faith and mission support
- For leadership development
- For theological education
- New Ministries
- Mission & Service

[www.unitedchurchfoundation.ca](http://www.unitedchurchfoundation.ca)  
 200-3250 Bloor St. W, Toronto, ON M8X 2Y4  
 866-340-8223 | [fdn@united-church.ca](mailto:fdn@united-church.ca)

**Additional Organizations/Donations:**

Name & Address of Organization	Amount or Percentage	Special Instructions