



## Donation of Publicly Traded Securities to The L'Arche Foundation of Greater Vancouver

Thank you for your interest in donating securities to the L'Arche Foundation of Greater Vancouver. A gift of publicly traded securities, such as stocks, bonds or mutual funds, can be made to the Foundation. Transferring securities is easy to do. Simply follow these directions:

1. Complete the attached form (you may need your broker's assistance) and deliver it to your broker or financial advisor with regard to your wish to make a gift of securities to the L'Arche Foundation of Greater Vancouver.
2. Your broker should contact and deliver the form and the securities to our agent, Credential Securities, 7<sup>th</sup> Floor, 1111 West Georgia Street, Vancouver, BC V6E 4T6

**For the account of:**      **The L'Arche Foundation of Greater Vancouver**  
**Account Numbers:**    **2V3-758A-7 (= Canadian Account): 2V3 – 758B-6 (= US Account)**  
**Contact:**                **Credential Securities**  
**Phone:**                 **604-742-2900                      Fax: 604-742-2901**  
**Email:**                 **support@credentialdirect.com**

3. Once the securities have been transferred to the Foundation's brokerage account, Credential Direct will advise us in writing of the receipt of the securities and the closing bid value on the day the securities transfer form was signed and received by the Foundation. If the transfer form is not received on the date signed, then the date of the gift is the date the shares are received by Credential Securities into the L'Arche Foundation of Greater Vancouver's account.
4. We will issue an official receipt to you, for income tax purposes, for the value as determined by the transaction date of the donation as discussed in point 3 above.
5. It is the Foundation's policy that securities, once received by the Foundation or its broker, be sold or added in specie to the Foundation's investment portfolio in accordance with the Foundation's investment policies.

Thank you again for making a difference in the lives of people at L'Arche. If you have any questions, please do not hesitate to contact us:

Elizabeth MacKeigan  
Director of Finance & Support Services  
604-435-9544 ex 101  
604-307-9507 (cell)  
[emackeigan@larchevancouver.org](mailto:emackeigan@larchevancouver.org)

The L'Arche Foundation of Greater Vancouver  
100-7415 Sussex Avenue  
Burnaby, BC V5J 0K1



# Donation of Publicly Traded Securities to The L'Arche Foundation of Greater Vancouver

*In order to make your gift, please complete this form and fax or email to your broker (the delivering custodian). Your broker will be able to provide the CUSIP and/or FINS numbers.*

*Your broker needs to fax this form to Credential Securities at 604-742-2901 AND L'Arche Greater Vancouver, Attention: Elizabeth MacKeigan at 604-435-9560 and needs to deliver the securities.*

*Unexpected and/or unidentifiable transfers may make it difficult for the Foundation to issue the appropriate tax receipt.*

*Please contact Elizabeth MacKeigan at 604-435-9544 ext 101 with any questions about the gift of securities' transfer process.*

### **Name and Contact Details of Donor's Broker/Delivering Custodian (DC)**

To: \_\_\_\_\_  
Name of Donor's Brokerage/Delivering Custodian

Attention: \_\_\_\_\_  
Name of Contact Person at Donor's Brokerage/Delivering Custodian

FINS# \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_ FAX (\_\_\_\_) \_\_\_\_\_  
(Broker 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/DC**

I hereby give authorization to deliver free as a charitable gift the following securities to Credential Securities (CUID# = CRED) (DEALER CODE# = 7799) (DTC# 5083) for credit to account # 2V3-758A-7 (CDN) or # 2V3-758B-6 (US) in the name of the L'Arche Foundation of Greater Vancouver. Please deliver free:

Full Name of Security: \_\_\_\_\_ CUSIP# \_\_\_\_\_  
(Broker/DC to complete)

Market Symbol \_\_\_\_\_ Number of Shares/Units to Transfer: \_\_\_\_\_  
(Broker/DC to complete)

### **Authorization of Donor/Client**

\_\_\_\_\_  
Signature Day Month Year

### **Gift Designation Instructions from Donor to the Foundation**

Please use my gift as follows:

- Top priority of the L'Arche Foundation of Greater Vancouver
- Housing OR
- Another specific fund or purpose \_\_\_\_\_  
(Please specify)

cc: L'Arche Foundation of Greater Vancouver, Attn: Development and Finance Offices: FAX 604-435-9560

cc: \_\_\_\_\_ FAX \_\_\_\_\_

**The L'Arche Foundation of Greater Vancouver**  
Charitable Reg. # 137648671RR0001