



**WEST VANCOUVER
FOUNDATION**

Gift of Securities

Donation Instructions

Thank you for considering a gift of securities to the West Vancouver Foundation.

3 STEPS TO MAKING YOUR DONATION

1. Prior to initiating your gift of securities, please contact our Fund Administrator, Susan Beck at 604-925-8153 to determine if we can accept the securities.*
2. Have your financial advisor complete the attached Authorization and Direction Form for your signature. Once completed, send a scanned copy of the form to the West Vancouver Foundation at susan@westvanfoundation.ca.
3. Have your financial advisor INITIATE the transfer of securities. Because the transfer is a charitable donation, the West Vancouver Foundation's investment broker cannot initiate the transaction.

Valuation and Sale of Securities

The West Vancouver Foundation will issue a donation receipt to you for the value of the securities based on the last quoted trading price in normal trading hours on the date the securities are received into the West Vancouver Foundation's brokerage account. Please note that the market will, in all likelihood, have moved either up or down between the time you give the instructions to transfer and the time we receive the securities. Once the securities and completed Authorization and Direction Form are received by the West Vancouver Foundation, the securities will be sold as soon as possible and the proceeds deposited into the identified fund.

This means, for example, that you could give instructions to transfer securities when they are worth \$11 each, receive a donation receipt for them when they are worth \$10 each, and have the proceeds of sale deposited to the fund at the Foundation when they are sold at \$9 each. We work to minimize, as much as possible, any differences in the value of securities during the transfer and sale period.

Timing

Please be aware that it is logistically very difficult, if not impossible, to transfer securities in the last weeks of December. As well, certain securities such as mutual funds can take several months or more to transfer, depending on the complexity of the gift. Avoid this risk by planning your gift well in advance.

Further Information

If you have any questions or require further information about making your gift, please contact our Fund Administrator, Susan Beck at 604-925-8153. Thank you again for your gift of generosity and trust in the West Vancouver Foundation.

*Gifts of securities are subject to review by the West Vancouver Foundation prior to acceptance and sale.

**775 -15th Street, West Vancouver, BC V7T2S9 | 604-925-8153 | westvanfoundation.ca
Charitable Registration Number 13217 1679 RR0001**

WEST VANCOUVER FOUNDATION

AUTHORIZATION AND DIRECTION FORM

Please note: Your financial advisor MUST INITIATE the transfer of securities and forward a scanned copy of this completed form to susan@westvanfoundation.ca.

Date: _____

This form authorizes the transfer of the following securities currently owned by me/us from my/our account # _____ to the West Vancouver Foundation account # 809 17151 13 at RBC Dominion Securities*. I/We further authorize the delivering institution to discuss the details of this transfer with RBC Dominion Securities, in order to facilitate this request.

| Type of securities (Please check) | CDN Stock | US Stock | Mutual Fund |
|--|-----------|----------|-------------|
| Number of securities: | _____ | _____ | _____ |
| Ticker symbol (if applicable): | _____ | _____ | _____ |
| Name of security: | _____ | | |
| Name of your financial advisor: | _____ | | |
| Name of financial advisor's company: | _____ | | |
| Financial advisor's contact info: Tel: | _____ | Email: | _____ |

Gift to be anonymous? Yes No *(In order to properly recognize all donors for their contribution, the West Vancouver Foundation will share your name, donation amount and contact details with the fund holder unless you have checked "Yes" to the anonymous box above.)*

It is my/our understanding that the tax receipt will be issued based on the last quoted trading price during normal trading hours on the date that the securities are received into the West Vancouver Foundation's account. It is also my/our understanding that the above securities will be offered for sale as described in the West Vancouver Foundation guidelines and the net sale proceeds will be credited to the following fund at

The West Vancouver Foundation:

(Fund name)

Donor's name Signature

Donor's address Email

Donor's name Signature

Donor's address Email

*Account: 809 17151 13 | West Vancouver Community Foundation | CUID: DOMA | RBC Dominion Securities
180 Wellington St W, 12th Floor, Account Transfer Department, Toronto ON M5J 0C2 | Advisor: Jim Ferrier

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