



## Gift of Securities **Donation Instructions**

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

### 2 STEPS TO MAKING YOUR DONATION

1. Please complete (may need help from your financial advisor) and sign the attached Authorization and Direction Form. Once completed, please send a scanned copy of the form to the West Vancouver Foundation at alexandrap@westvanfoundation.ca.
2. Have your financial advisor INITIATE the transfer of securities.

### 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 this may be a different value than the value at the time you gave the instruction to transfer, depending on market activity. 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.

### Timing

Please be aware that it may be logistically difficult to transfer securities from your investment firm in the last weeks of December. As well, certain securities can take extended time 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, Alexandra Pearson at 604-925-8153.

**Thank you again for your gift of generosity and trust in the West Vancouver Foundation.**

# 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 alexandrap@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 circle)**      **CDN Stock**                      **US Stock**                      **Mutual Fund**

Number of securities: \_\_\_\_\_ Estimated value of gift \$ \_\_\_\_\_

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: \_\_\_\_\_

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 soon as is actionable and the net sale proceeds will be credited to the following fund at The West Vancouver Foundation or to the WVF Capacity Building and Growth Fund if no specific fund is named:

(Fund name)

**Gift to be anonymous?**                      *(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 circled "Yes" to the anonymous box above.)*

Donor's name                                      Signature

Donor's Email                                      Donor's Address

Donor's name                                      Signature

Donor's Email                                      Donor's Address

\*Account: 809 17151 13 | West Vancouver Community Foundation | CUID: DOMA | RBC Dominion Securities  
180 Wellington St W, 12<sup>th</sup> Floor, Account Transfer Department, Toronto ON M5J 0C2 | Advisor: Gordon Clark