



DONATION OF PUBLICLY-TRADED SECURITIES TO UNITED WAY GREATER VICTORIA

BROKERAGE INFORMATION

Date _____

TO:

Delivering Firm (Donor's Broker) _____

Address _____

Name of Broker _____ Phone _____

Email _____

FROM:

Name of Donor _____

Address _____

Phone _____

Email _____

PLEASE TRANSFER THE FOLLOWING SECURITIES IN KIND TO THE BROKERAGE ACCOUNT OF UNITED WAY GREATER VICTORIA:

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

SECURITIES FOR THE BENEFIT OF UNITED WAY GREATER VICTORIA MAY BE RECEIVED INTO THE FOLLOWING ACCOUNT:

RBC Phillips Hager & North Investment Counsel

Account #46305290-16

CUID code is DOMA

DTC code is 5002

**DONATION OF PUBLICLY-TRADED SECURITIES TO UNITED WAY GREATER VICTORIA
DONOR DIRECTION**

This transfer is a charitable donation to United Way Greater Victoria

Business Number 119278224RR0001

PLEASE DIRECT MY GIFT AS FOLLOWS (please indicate your choice(s) for donating your gift)

Where the need is greatest in the community

or to a specific priority area(s)

KIDS

Supporting children and youth with opportunities

\$ _____

POVERTY

Moving people from poverty to possibility

\$ _____

COMMUNITY

Developing the capacity of people to care for themselves and their families

\$ _____

Optional: To a specific charity in Canada. Minimum \$25 per charity, allow \$12 cost recovery fee per designation.

Canadian Charity Name	City	**Charitable Registration No.	Gift Amount
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

**In order for us to process your designation, you must provide us with a registered charity number. Visit www.cra.gc.ca for a listing of charities. If the information provided is incomplete, or the charity does not have a charitable tax number from CRA, your donation will be directed to United Way.

Release my name to the charity for recognition: Yes No

ACKNOWLEDGEMENT OF YOUR GIFT

Recognition May we recognize your donation in our publications and/or to flow through charities?

Yes No If yes, please print name(s) as you would like it to appear. _____

YES I would like to receive electronic communications about United Way activities, the impact my donation is making in the community, events, surveys and thank yous. I understand that I can unsubscribe at anytime.

Donor Signature _____

DONATION OF PUBLICLY-TRADED SECURITIES TO UNITED WAY GREATER VICTORIA

Thank you for donating securities to United Way Greater Victoria. Please follow these instructions:

1. Once you have notified United Way of your intention to donate securities by emailing or faxing a copy of this document to Marg Rose, please also provide a copy to your broker or advisor. Your broker can assist you in completing this form or United Way can do so. If the latter, please call Marg Rose at (250) 220-7365.
2. Your broker or advisor will arrange for the transfer of securities to the United Way's account at RBC Phillips Hager & North. If your broker needs further information to complete the transfer, he/she should contact Gordon Walker at RBC Phillips Hager & North, Email: Gordon.walker@rbc.com; Ph: (250) 356-3907.
3. Once the securities have been transferred to United Way's account, RBC Phillips Hager & North will advise us of the receipt of the securities and the closing market value on the day the securities were received into our account. We will issue a receipt to you for income tax purposes with the donation amount equal to the transfer date's closing market value.
4. United Way Greater Victoria may sell the securities once received.

We thank you for helping to change lives and build our community. If you have further questions, please contact Marg Rose, Director of Philanthropy at (250) 220-7365 or by email: marg.rose@uwgv.ca