Donation Of Publicly-Traded Securities To United Way Greater Victoria

Thank you for your charitable donation of securities to United Way Greater Victoria. The following instructions are easy to follow in order to process your gift:

1. Please notify United Way of your intention to donate securities by emailing or faxing a copy of this document, 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.

2. Your broker or advisor will arrange for the transfer of securities to the United Way's account. If your broker needs further information to complete the transfer, he/she should contact United Way.

3. Once the securities have been transferred to United Way's account, our broker 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.

1. United Way Greater Victoria contact information:
Marg Rose, Director of Philanthropy at (250) 220-7365 or by email marg.rose@uwgv.ca

Date _____

2. **Brokerage Information:**

Delivering Firm (Donor's Broker) _____

Address _____

Name of Broker _____ Phone _____

Email _____ Client Account Number _____

Donation From:

Name of Donor _____

Address _____

Phone _____ Email _____

3. Please transfer the following securities in kind to the brokerage account of United Way Greater Victoria:

_____ shares of _____
(Number of shares) (Name of security)

_____ shares of _____
(Number of shares) (Name of security)

Approximate Value of Shares $_____

4. United Way Brokerage Information:

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

5. Acknowledgement of Your Gift

Leadership Recognition Your gift may distinguish you as a United Way Leader online. May we recognize your donation? ○ Yes ○ No

If yes, please print name(s) as you would like it to appear. _____

MY COMMUNICATION PREFERENCES *I wish to receive:*

Invitations to special events (such as recognition events and launches)	Acknowledgements, general information regarding United Way, and details about the impact your gift is making in the community
Mail ○ Yes ○ No	**Mail** ○ Yes ○ No
Email ○ Yes ○ No	**Email** ○ Yes ○ No
Phone ○ Yes ○ No	**Phone** ○ Yes ○ No

6. Donor Signature _____