



Donation of Publicly Listed Securities to the Victoria Cool Aid Society

Thank you for your interest in donating securities to the Victoria Cool Aid Society. A gift of publicly listed securities, such as stocks, bonds or mutual funds, can be made to the Society. Transferring securities is very easy to do; simply follow these instructions:

1. Complete and deliver pages 2 and 3 of this document to your broker or financial advisor AND Victoria Cool Aid Society in order to carry out your instructions with regard to making a gift of securities to the Victoria Cool Aid Society. You may need your broker's assistance to complete this form.
2. Once the securities have been transferred to the Victoria Cool Aid Society's self-directed brokerage account, we will be advised of the receipt of the securities and the closing market value on the day the securities were received into our account.
3. We will issue a donation receipt to you, for income tax purposes. A gift of shares is considered a gift in kind and will be issued for the fair market value of the shares on the date the transfer of ownership takes place.
<https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/receiving-gifts/donation-shares.html>
4. It is the Victoria Cool Aid Society's policy that securities, once received by the Society, will be sold in accordance with the Cool Aid Society's investment policies. The cash value will be distributed in accordance with the donor's direction.

Once again, we thank you for supporting our community. If you have any questions, please contact:

Victoria Cool Aid Society
101-749 Pandora Ave
Victoria, BC V8W 1N9
P: 250.383.1977 F: 250.383.1639
donate@coolaid.org



**Donation of Publicly Listed Securities
to the Victoria Cool Aid Society
Brokerage Information**

DATE: _____

TO:

Delivering Firm (Donor's Broker) _____

Branch _____

Address _____

Name of Broker _____ Phone _____

Email _____ Fax _____

FROM:

Name of Donor _____

Account # _____

Address _____

Phone _____ Email _____

PLEASE TRANSFER THE FOLLOWING SECURITIES IN KIND TO THE SELF-DIRECTED
BROKERAGE ACCOUNT FOR THE VICTORIA COOL AID SOCIETY AT TD WATERHOUSE:

_____ 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 the Victoria Cool Aid Society may be received into the following accounts:

TD WATERHOUSE

CANADIAN SECURITIES

CUID: GIST

Re: Victoria Cool Aid Society

Account: 20J8F5-A

U.S. SECURITIES

CUID: GIST

Re: Victoria Cool Aid Society

Account: 20J8F5-B

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to the Victoria Cool Aid Society

Donor Direction

THIS TRANSFER IS A CHARITABLE DONATION TO THE VICTORIA COOL AID SOCIETY:

Charitable Organization Number 12820 5069 RR0001

PLEASE DIRECT MY GIFT AS A:

Gift to the Greatest Need

Designated Gift for the following Program:

Donor's signature _____ Date

Please fax or send a scanned copy of this form to start the process for your donation:

Victoria Cool Aid Society

Contact: donate@coolaid.org