



## Gifts of Securities Donor Instructions

Significant tax savings occur when you donate publicly traded securities directly to the Archdiocese or your parish. Securities include stocks, bonds and mutual funds. Securities received by the Archdiocese are sold and the cash proceeds are used according to your wishes.

### How to Make a Gift of Securities to the Archdiocese or your parish:

#### 1. Notify the Archdiocese of your intention

When planning to make a gift of securities to the Archdiocese or your parish, please notify the Development Office at the Archdiocese at 604-683-0281 or [development@rcav.org](mailto:development@rcav.org). You will need to provide written intent with the Gift of Securities Authorization Form stating where the cash proceeds from your gift are to be directed. The Archdiocesan Development team will facilitate your gift to ensure the transfer process is smooth and a timely tax receipt is issued.

#### 2. Advise your broker

Advise your broker that you would like to make a gift of securities through a direct transfer to the Archdiocese of Vancouver. If your broker requires a written letter of direction you can refer to the Archdiocese of Vancouver Gifts of Securities Authorization form attached.

To transfer securities electronically, your broker will need the following information:

Our Broker: Stewart D. Hayashi, Advisor and VP  
RBC Dominion Securities  
Fax: 604-235-9950  
Tel: 604-257-7330  
Email: [stewart.hayashi@rbc.com](mailto:stewart.hayashi@rbc.com)

Account Name: Roman Catholic Archbishop of  
Vancouver Account #: 803-21488-12  
Charitable Registration Number: 11884 9470 RR0004

For all Mutual Funds:

For all Canadian and US Securities:	CDS FINS#	T002	CDS FINS#	T002
	CUID	DOMA	CUID	DOMA
	DTC#	5002	DTC#	5002
			Dealer Code	9190
			Rep Code	SDH

*Please instruct your broker to send a completed copy of the Securities Authorization Form to Stewart Hayashi.*

#### 3. Charitable tax receipt

Shares received by the Archdiocese are immediately sold and the net proceeds are directed to the parish or Archdiocesan priority according to your wishes. Please note that **brokerage commission may be charged by the Archdiocesan broker when the shares are sold**. You will receive a charitable tax for the close value of your securities on the date they are received into the Archdiocesan brokerage account.

*\* Should you have paper stock certificates, please contact us and we will make alternative arrangements.*

Your generosity and support are greatly appreciated. Should you have any questions about gifts of securities, please contact the Archdiocese Development Office at 604-683-0281.



### Gift of Securities Authorization Form

To ensure the transfer process is smooth and a timely tax receipt is issued, please send a copy of this completed form to [development@rcav.org](mailto:development@rcav.org) before authorizing the transfer with your broker. You may also contact the Development Office by calling 604-683-0281 ext. 50316.

#### Name & Contact Details of Donor's Broker

TO: \_\_\_\_\_  
Name of the Donor's Broker and Brokerage Firm

FINS# \_\_\_\_\_ Telephone \_\_\_\_\_ Fax: \_\_\_\_\_

FROM: \_\_\_\_\_ Acct #: \_\_\_\_\_  
Name of Donor for charitable tax receipting purposes

Donor's Address: \_\_\_\_\_

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code \_\_\_\_\_ Tel: \_\_\_\_\_

Email: \_\_\_\_\_

#### Instructions from Donor to Donor's Broker

I hereby give authority to deliver free as a charitable gift the following securities to the Archdiocese of Vancouver:

Securities Name	CUSIP#	# of Shares/Units to Transfer	Approx. Value

#### The donation is for the benefit of:

Parish \_\_\_\_\_  
*Parish Name* \_\_\_\_\_ *City* \_\_\_\_\_

Select All that Apply

Project Advance \_\_\_\_\_  
*Percentage*

Offertory \_\_\_\_\_  
*Percentage*

Other \_\_\_\_\_  
*please specify* \_\_\_\_\_ *Percentage*

Other Area within the Archdiocese of Vancouver

Select All that Apply

Archbishop's Priorities Fund \_\_\_\_\_  
*Percentage*

St John Vianney Fund/Vocations \_\_\_\_\_  
*Percentage*

The Door is Open \_\_\_\_\_  
*Percentage*

Other \_\_\_\_\_  
*please specify* \_\_\_\_\_ *Percentage*

Additional Comments: \_\_\_\_\_

Donor's Signature \_\_\_\_\_ Date \_\_\_\_\_