

# GIFT OF SECURITIES

## LETTER OF AUTHORIZATION FROM DONOR

32 First Street, Ste. 003C, Orangeville, ON L9W 2E1  
(519) 938-0780 | [info@dufferincommunityfoundation.ca](mailto:info@dufferincommunityfoundation.ca)  
[www.dufferincommunityfoundation.ca](http://www.dufferincommunityfoundation.ca)  
Charitable Registration # 780219911 RR 0001



**Thank you for considering a gift of securities to Dufferin Community Foundation.** Making a gift of publicly listed securities is a simple, easy process and a wonderful way to support the Foundation. In order for stocks/mutual funds to be legally transferred and accepted by Dufferin Community Foundation and our brokerage firm, please fill out this form, print and sign it, and then scan/email it to both to your broker with a copy to both Dufferin Community Foundation, [info@dufferincommunityfoundation.ca](mailto:info@dufferincommunityfoundation.ca) and to RBC PH&N Investment Counsel, by Email to [susanna.arcangel@rbc.com](mailto:susanna.arcangel@rbc.com) and/or [gina.sim@rbc.com](mailto:gina.sim@rbc.com) or via Fax: 416-956-5060. **To ensure a tax receipt for the current year, paperwork must be received by December 15<sup>th</sup>.**

### A. DONOR INFORMATION (for receipting purposes)

Name			
Address	City	Province	Postal Code
Telephone	Email		
Donor's Signature (REQUIRED)		Date	

### B. BROKER INFORMATION (please have your broker complete this section)

Investment Advisor's Name		Financial Institution	
Broker's Telephone Number	Fax Number	Broker's Email	

### C. DESCRIPTION OF YOUR SECURITIES TO BE DONATED

☐ I hereby give permission to transfer the following securities to Dufferin Community Foundation.

Number of Shares	Class of Shares (Common or Preferred)	Name of Security
CUSIP#	Account #	FINS#

☐ I'd like to designate my gift. (Please see next page for a list of our charitable funds.)

### D. ACCOUNT INFORMATION FOR DUFFERIN COMMUNITY FOUNDATION

Transfer to:	DTC #	CUID:	Dealer #:	CAD Investment Account:
RBC PH&N Investment Counsel 180 Wellington St West, 10 <sup>th</sup> Fl Account Transfer Dept. Toronto, ON M5J 0C2 Fax # (416) 313-7493	5002	DOMA	9190 / REP# 1RG	46322328-17

All donated securities are sold upon receipt. The value of your tax receipt will be determined by the closing price on the day that PH&N receives the shares into its brokerage account, and as per applicable Canada Revenue Agency guidelines.

# I would like to direct my gift of securities to the following fund(s).

For a current list and descriptions of our charitable funds, please visit [dufferincommunityfoundation.ca/our-funds/](http://dufferincommunityfoundation.ca/our-funds/)

## Field of Interest Funds



☐ Arts, Culture & Heritage Fund



☐ Children & Youth Fund



☐ Dufferin Emergency Support Fund (non-endowed)



☐ Dufferin Vision Fund



☐ Environment Fund



☐ Foundation Sustainability Fund (non-endowed)



☐ Mulmur Community Fund



☐ Refugee Resettlement Fund



☐ Rosemary Molesworth Memorial 3-D Art Fund



☐ Shelburne Community Fund

## Donor-advised Funds

☐ Cedar Fund

☐ Carroll Family Fund

☐ Greenwood Family Fund

☐ Mikoliew Mach Fund

☐ The Woodlot Endowment Fund

☐ W. & M. Edelbrock Fund

## Organization Funds



☐ Big Brothers Big Sisters Charitable Endowment Fund



☐ Museum of Dufferin Endowment Fund



☐ Streams Creative Futures Fund

# THANK YOU FOR YOUR GIFT!

### Dufferin Community Foundation

32 First Street, Ste. 003C, Orangeville, ON L9W 2E1

Tel: (519) 938-0780

Email: [info@dufferincommunityfoundation.ca](mailto:info@dufferincommunityfoundation.ca)

### RBC PH&N Investment Counsel

Brookfield Place, 181 Bay Street, Suite 2410 Toronto, Ontario M5J 2V1

#### Susanna Arcangel

Tel: (416) 956-0937

Email: [susanna.arcangel@rbc.com](mailto:susanna.arcangel@rbc.com)

#### Gina Sim

Tel: (416) 956-0765

Email: [gina.sim@rbc.com](mailto:gina.sim@rbc.com)



**DUFFERIN**  
COMMUNITY  
FOUNDATION

Connecting people who care to causes that matter in Dufferin County