



## Donations of Publicly Traded Securities to Corpus Christi Parish

Thank you for your interest in donating securities to Corpus Christi Parish. A gift of publicly –traded securities such as stocks, bonds, or mutual funds can be made to the Parish. This is easy to do and these instructions will guide you through the transaction:

1. Complete the attached Authorization form (you may need your broker’s assistance) and deliver it to your broker.
2. Your broker should contact and deliver the form and the securities to either one of our brokers:

Mr. Stewart D. Hayashi, Investment Advisor and VP  
RBC Dominion Securities Inc.  
2500 - 666 Burrard Street  
Vancouver, BC V6C 3B1  
Tel: 604 257-7330  
Fax 604 257-7391  
Email: [stewart.hayashi@rbc.com](mailto:stewart.hayashi@rbc.com)

Or: Mr. Richard D. Cheng, Investment Advisor and VP  
BMO Nesbitt Burns Inc.  
1800 - 885 W Georgia Street  
Vancouver, BC V6C 3E8  
Tel: (604) 631-2628  
Fax: (604) 631-2618  
Email: [richard.Cheng@nbpcd.com](mailto:richard.Cheng@nbpcd.com)

3. Once the securities have been transferred to the Archdiocese’s brokerage account our broker will advise us in writing of the receipt of the securities and the closing bid value on the day the securities donation form was signed and received by the Archdiocese and the broker. If the transfer form is not received on the date signed, then the date of the gift is the date the shares are received by our broker into the Archdiocesan account.
4. We will issue an official receipt to you, for income tax purposes, for the value as determined by our broker.
5. It is the Archdiocese’s policy that the securities, once received by the Archdiocese or its broker, may be sold or added in specie to the Archdiocese’s investment account in accordance with the Archdiocese’s investment policies.

Thank you for supporting Corpus Christi Parish. Your gift will be used prayerfully to steward the needs of the parish.

If you have any questions or concerns, please do not hesitate to call:

Fr. Bruce-John Hamilton, Pastor, Campaign Director, Corpus Christi Parish

604-324-2265



## Donation of Publicly Traded Securities

### Corpus Christi Parish Authorization Form

Donation of marketable securities, stocks, bonds, warrants, futures or mutual funds which must be tradable at an exchange approved by Canada Revenue Agency.

#### Name & contact Details of Donor's Broker/Delivering Custodian (DC)

TO: \_\_\_\_\_  
Name of the Donor's Brokerage/Delivering custodian

Attn: \_\_\_\_\_  
Name of the Contact Person at the Donor's Brokerage/Delivering Custodian

FINS# \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_  
(Broker/DC to complete)

#### Donor/Client Information

FROM: \_\_\_\_\_  
Name of donor/client for charitable tax receiving purposes

Full Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone: \_\_\_\_\_ e-mail: \_\_\_\_\_

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

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

Full Name of Security: \_\_\_\_\_ CUSIP# \_\_\_\_\_  
(Broker/DC to complete)

Market Symbol: \_\_\_\_\_ Number of shares/Units to transfer: \_\_\_\_\_  
(Donor or Broker/DC to complete)

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

**The donation is for the benefit of the Corpus Christi Parish Capital Campaign, Vancouver, BC.**

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

**Please instruct your broker to send a copy of this completed form to each of the below:**

- The Archdiocesan broker contacted for this transaction:
  - Stewart Hayahsi, VP RBC Dominion Securities – [stewart.hayahsi@rbc.com](mailto:stewart.hayahsi@rbc.com)
  - Richard Cheng, VP BMO Nesbitt Burns – [richard.cheng@nbpcd.com](mailto:richard.cheng@nbpcd.com)
- Francis Wong, Director of Finance, Archdiocese of Vancouver – [fwong@rcav.org](mailto:fwong@rcav.org)
- Brett Powell, Director of Development, Archdiocese of Vancouver – [bpowell@rcav.org](mailto:bpowell@rcav.org)
- Fr. Bruce-John Hamilton, Pastor, Corpus Christi Parish – [parish.cc@rcav.org](mailto:parish.cc@rcav.org)