

Gifts of Publicly Traded Securities from a Non-Registered Account

Significant tax savings occur when you donate publicly traded securities directly to The Synod of the Diocese of Kootenay. Securities include stocks, bonds, and mutual funds. Securities received by The Synod of the Diocese of Kootenay are immediately sold and the cash proceeds are used according to your wishes.

How to Make a Gift of Securities to The Synod of the Diocese of Kootenay:

1. Notify The Synod of the Diocese of Kootenay of your intention

When planning to make a gift of securities to The Synod of the Diocese of Kootenay, please notify The Synod of the Diocese of Kootenay at 778-478-8310. The Synod of the Diocese of Kootenay facilitates 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 Synod of the Diocese of Kootenay. If your broker requires a written letter of direction, a sample "Direction to Transfer Shares" is attached.

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

Steve Wallouch	FINS # T002
RBC Dominion Securities Phone:	CUID – DOMA FIRM # 9190
250-712-2166	DTC # 5002
Fax: 250-712-2179	
e-mail: steve.wallouch@rbc.com	Diocese account # 832-19161-1-9

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

**Should you be a resident of the United States, please contact us and we will make alternative arrangements.*

3. Charitable tax receipt

Shares received by The Synod of the Diocese of Kootenay are immediately sold and the net proceeds are directed to The Synod of the Diocese of Kootenay fund of your choice. You will receive a charitable tax receipt for value of your securities on the date they are received into The Synod of the Diocese of Kootenay brokerage account.