

CHARITABLE DONATION PROCEDURE FOR SECURITIES:

Donating securities; such as stocks, bonds and mutual funds, from your investment portfolio is another way to extend the reach of your charitable giving plan and create tax advantages. This is because donations of publicly traded securities are eligible for a zero percent capital gain inclusion rate, effectively eliminating the capital gains tax. If your shares have increased in value since you bought them, your financial planner can help to determine which asset to donate and timing to maximize tax benefits.

To donate securities (shares, bonds, mutual funds) to Sunshine Coast Community Services Society you need to provide your broker with a Letter of Direction (LOD) or complete the financial institution donation form.

You will need the following information:

Donor name: _____

Financial Institution (FI) name: _____

FI address _____

Delivering account #: _____

CUID: _____

DTC Participant ID: _____

FI Contact name & number: _____

Account number: _____

Detailed instructions as to what to transfer

QTY	Symbol	Securities Description

Investors Group Client Account Information

IGSI account name: Sunshine Coast Community Services Society

Manual Delivery of Securities Script

Please deliver OTC/DTC security(s) as follows: Receiving account #: IG11639259
CUID: NBCS
DTC Participant ID: 5008

OR

Mutual Funds POA Script

Please fax POA(s) to Investors Group at 1-866-202-1923
POA(s) should be faxed along with the donation letter and may also
be emailed to transfer-in@ig.ca

Authorization:

I, the undersigned Grantor, authorize the transfer of the securities described above to the Grantee and give instructions to the Delivering Institution to initiate and complete the transfer. I declare that the transfer is done without any compensation and that this is a charitable donation.

Client signature:

Date:

Once the LOD (letter of direction) is received by the relinquishing institution, the transfer will be processed (it may take up to 5 business days turnaround time to be received at IGSI). If the transfer is not complete after this timeframe the consultant can follow up with his support line (or the IGSI client with the trade centre line) by providing the date the donation was processed by the delivering institution along with the details/copy of the FI donation form/LOD.