

Donation Instructions

Thank you for considering a gift of securities to the South Saskatchewan Community Foundation (SSCF).

2 STEPS TO MAKING YOUR DONATION

Step 1 – You or financial advisor can complete the attached *Authorization and Direction Form*. Once completed, send a scanned copy of the form to SSCF at finance@sscf.ca. If you have any questions prior to the transfer, our office number is 306-751-4756.

Step 2 – Have your financial advisor or you, if you are a self-investor, **INITIATE** the transfer of securities. Because the transfer is a charitable donation, SSCF cannot initiate the transaction.

Valuation and Sale of Securities:

The SSCF will issue a donation receipt to you for the value of the proceeds of the sale of the securities. Please note that the market will, in all likelihood, have moved either up or down between the time you give the instructions to transfer and the time the securities are received and sold. Once the securities are completed and the *Authorization and Direction Form* are received, the securities will be sold as soon as possible and the proceeds deposited into the identified fund.

An important reminder that not only will you receive the tax benefit from the donation, the CRA waives all capital gains once the stocks are transferred so you do not get taxed on any gains made from holding your stocks!

Timing:

Please be aware that it is logistically tricky to transfer securities in the last week of December as these transfers can take a few business days. As well, certain securities such as mutual funds could take several weeks or more to transfer, depending on the complexity of the gift. Please avoid this risk by planning your gift well in advance of the December 31 year end.

Questions:

If you have any questions or require further information about making your gift, please contact our Director of Finance & Administration at 306-751-4756.

Thank you again for your trust in the South Saskatchewan Community Foundation.

AUTHORIZATION AND DIRECTION FORM

Please Note: You or your financial advisor **MUST INITIATE** the transfer of securities and forward a scanned copy of this completed form to finance@sscf.ca

Date: _____

This form authorizes the transfer of the following securities currently owned by me/us from my/our account # _____ to the

Account Name: **South Saskatchewan Community Foundation Inc.**

Account Number: **5889609219**

Institution: CIBC Investors Services Inc.;

Institution Address: 22 Front St. W., 4th Floor; Toronto, ON; M5J 2W5

CUID: WGDB; DTC: 5030; Dealer: 9479; FINS: T079

Please fill out the below information to assist with the transfer and the donation receipt.

Number & Name of Securities: _____
Example: 100 AAPL & 150 COST

Financial Advisor Name (if applicable): _____

Financial Advisor Company (if applicable): _____

Telephone: _____ Email: _____

Date of Transfer: _____

You will receive an Official Receipt for Income Tax purposes from SSCF for the proceeds of the sale of the securities once the transfer is complete. Please provide the information for the donation:

Donor Name: _____

Telephone: _____ Email: _____

Address of Donor: _____

Signature as Required: _____

The Fund to Distribute the Funds to:

- SSCF Operating Fund (Non-Endowed) Truth & Reconciliation Fund (Non-Endowed)
- Vital Community Fund (Endowed) Other: _____