

DONATION OF PUBLICALLY TRADED SECURITIES TO THE ROMAN CATHOLIC DIOCESE OF CALGARY

[Ref: Ascension Catholic Parish Building Fund Donor Wall Project]

Thank you for supporting the Roman Catholic Diocese of Calgary with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple, and may result in significant tax savings for you.



1. Donor Information

Name: _____
Address: _____
City: _____ Prov _____ Postal Code _____
Phone: _____ Email: _____

2. Designation Information

This donation is made in support of: **Ascension Catholic Parish Building Fund**

Broker Name: _____
Company Name _____
City: _____ Prov _____ Postal Code _____
Phone: _____ Email: _____
Fax: _____

4. Securities to be Transferred

From Account # _____
_____ shares of _____
_____ shares of _____

5. Transfer Securities in Kind to:

**Roman Catholic Diocese of Calgary,
Investment Account # 701-86549-18**

RBC Dominion Securities

FINS: T002 CUID: DOMA DTC: 5002 Rep Code: 9190 RSL
(Mutual Funds)

I authorize this transfer as a charitable donation to the Roman Catholic Diocese of Calgary. I agree that the Roman Catholic Diocese of Calgary, or its agent, may contact my broker for the purposes of concluding this transaction.

Signature of Donor/Client

Date

- 1) **Complete this form.** This information is needed for the transfer, tracking and receipting of your donation.
- 2) **Give the form to your broker.** Your broker will arrange for the transfer of shares to the Diocese investment account. The Diocese or your Parish cannot initiate this transfer. If you do not have a broker, fax this form directly to your investment firm.
- 3) **Send a copy of the form to our broker (or ask that your broker do this):**

RBC Dominion Securities

Dave Simpson / Britt McLeod
Phone: 403-266-9615
Fax: 403-299-7100 (Securities)
416-313-8455 (Mutual Funds)
Email: dave.simpson@rbc.com
britt.mcleod@rbc.com

- 4) **Send a copy of this form to the Diocese (or ask your broker to do this),** so we can ensure a donation receipt is issued for your gift, when appropriate.

Finance Office:

Miriam Dawidowski
Phone: 403-218-5536
Email: Miriam.dawidowski@calgarydiocese.ca

Development Office:

Samantha Jones
Phone: 403-218-5531
Email: Samantha.jones@calgarydiocese.ca

**The Roman Catholic Diocese of Calgary's
Charitable Registration number is
107909939 RR0076**

YOUR DONATION RECEIPT

- The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the Diocese's custodian, RBC Dominion Securities, Inc.
- Exception – Transfers from an Estate:
Please contact Samantha Jones
(samantha.jones@calgarydiocese.ca) for information regarding the valuation of securities.

www.calgarydiocese.ca

Revised November 2019