



## Gift of Publicly Traded Securities

### Diocesan Annual Appeal – *Journey of Hearts and Hands*

To donate publicly traded securities and mutual funds, please follow the procedures below:

1. Instruct your broker to transfer securities to The Diocese of Victoria brokerage account at Richardson GMP
2. Complete this form and fax to 250-479-5423 or call 250-479-1331

#### A. INFORMATION ABOUT YOU

Name		Parish
Address		Postal Code
Phone		Email
Broker's Name	Brokerage Firm	CUID or DTC
Account Number	Broker's Phone	Broker's Fax/Email

#### B. DESCRIPTION OF SECURITIES

Type of Security	Number of Shares	Name of Security/Shares
Date of Transfer		

#### KINDLY NOTE

- It is not possible to issue an official receipt for income tax purpose until we are aware of your donation
- For privacy reasons, your broker cannot divulge your(client) contact information to us
- Tax receipts will be based on the closing price of shares the day they are received in our brokerage account

#### C. SECURITIES TO BE TRANSFERRED TO THE ACCOUNT OF THE DIOCESE OF VICTORIA

Contact: James Fray at Richardson GMP Ltd  
(250) 419-4260 Toll Free 1-877-419-2250  
Email [jay.fray@RichardsonGMP.com](mailto:jay.fray@RichardsonGMP.com)  
GMP Securities LP  
CUID - GMPT  
Dealer Rep - JS03  
Account – 50G-5AP0-A Canadian securities  
Account – 50G-5AP0-B US securities

Contact Leah Mackenzie at the Diocese  
(250) 479-1331 ext 231  
Email: [leahm@rcdvictoria.org](mailto:leahm@rcdvictoria.org)