



# Gift of Publicly Traded Securities Roman Catholic Diocese of Victoria

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

1. Instruct your broker to transfer securities to the Bishop of Victoria account with RBC Phillips, Hager & North Investment Counsel Inc.
2. Complete this form and send a copy to the Diocese Finance Office (Fax to 250-479-5423 or email [leahm@rcdvictoria.org](mailto:leahm@rcdvictoria.org)). We cannot complete the sale until this form is received.

## INFORMATION ABOUT YOU

Name

Street Address

City

Province

Postal Code

Phone

Email address

Recipient of Donation: (i.e. Diocese, Parish or School)

## DESCRIPTION OF SECURITIES

Type of Security

Number of Shares

Name of Security / Shares

Date of Transfer

Broker's Name

Brokerage Firm

CUID or DTC

Account Number

Broker's Phone

Broker's Fax/Email

### PLEASE NOTE

- We are unable to issue an official receipt for tax purposes until the transaction is complete.
- For privacy reasons, your broker cannot divulge your (client) contact information to us, so please provide the form to us first before initiating the transfer of securities.
- Tax receipts will be based on the closing price of shares the day they are received in our brokerage account.

Canada Revenue Agency Registered Charity # 129950804 RR 0001

## SECURITIES TO BE TRANSFERRED TO THE ACCOUNT OF THE BISHOP OF VICTORIA

Account Name: Bishop of Victoria  
CUID — DOMA  
DTC Code — 5002  
Account Number: 46352287-13

Contact: Joan M. Wiggins  
RBC Phillips, Hager & North Investment Counsel Inc.  
#502 - 707 Fort Street, Victoria, BC V8W 3G3  
(250) 356-4580  
Email: [joan.wiggins@rbc.com](mailto:joan.wiggins@rbc.com)

Contact: Leah MacKenzie, CFO  
Diocese of Victoria  
(250) 479-1331 ext 231  
Email: [leahm@rcdvictoria.org](mailto:leahm@rcdvictoria.org)

## SIGNATURE

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date