

## **GIFT OF SECURITIES**

*Instructions for the Electronic Transfer of Securities to  
Lutheran Foundation Canada  
(Lutheran Church Canada Financial Ministries)*

### **Steps for Donor to Follow:**

#### **Step 1:**

Print a copy of these instructions for reference and the **Gift of Securities Transfer Form**, from the Lutheran Foundation Canada website.

#### **Step 2:**

Complete the 6 sections of the transfer form. *(Please note Section 4 has been completed for you.)*

- ❑ Section 1: Provides the brokerage institution where your brokerage/investment accounts are located, and which currently hold the securities to be donated.
- ❑ Section 2: Provides the description and amount of the securities for donation.
- ❑ Section 3: Provides information regarding the donor who is to receive the charitable tax receipt.
- ❑ Section 4: Provides the location of the institution where these securities will be transferred (TD Waterhouse), and where the Foundation maintains its brokerage account.
- ❑ Section 5: Provides the donor's preference for how the gift will be used.
- ❑ Section 6: Provides Donor and Witness signatures. (Do not sign until at investment firm.)

#### **Step 3:**

Please note that the Transfer Form must be delivered in person to the institution named in Section 1 above. At the time of delivery, it must be signed in the presence of the firm's representative.

#### **Instruct them to fax a copy of the transfer form to:**

Dwayne Cleave, Treasurer  
Lutheran Foundation Canada  
Fax: (204) 832-3018

### **Investment Firm Processing**

#### **Step 4:**

The institution specified in Section 1 of the transfer form will begin transfer of the securities by electronically notifying TD Waterhouse (receiving institution) to expect the securities you have donated. Likewise, the Foundation will also be expecting the donation as a result of you having notified them via fax (sent in Step 3).

#### **Step 5:**

The Foundation will obtain the amount and value of the donated securities on the date the securities are received, and will use this value to prepare your tax receipt.

**Should you require clarification of this process, please contact Dwayne Cleave at 1-866-588-4422, ext. 2218**