**Donation of Publically Traded Securities**

**to the Roman Catholic Diocese of Calgary**

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) **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:**

Joann Churchill

Phone: 403-218-5534

Email: joann.churchill@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](http://www.calgarydiocese.ca)

Revised January 2019

1. Donor Information

Name

Address

City Prov Postal Code

Phone Email

2. Designation Information

This donation is made in support of:

3. Donor’s Broker Information

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