

## DONATION INSTRUCTIONS

Thank you for considering a gift of publicly-traded securities to Pacific Spirit United Church (“Pacific Spirit”).

The following are the steps to follow to make your gift of securities:

1. Please contact the Pacific Spirit office (604-263-5377 or [admin@pacificspirituc.com](mailto:admin@pacificspirituc.com)) to advise the Church that you are going to make a donation of securities, giving particulars of the securities, including the quantity to be donated.
2. If your financial advisor requires your written direction to make the donation, have your financial advisor complete that firm’s direction letter (or use the attached form prepared by Pacific Spirit’s broker) for your signature.
3. **Have your financial advisor initiate the transfer of securities.** Because the transfer is a charitable donation, Pacific Spirit’s investment broker, Credential Qtrade Securities Inc., cannot initiate the transaction.

## Valuation and Sale of Securities

Pacific Spirit will issue a donation receipt to you for the value of the securities based on the last quoted trading price in normal trading hours on the date the securities are received into Pacific Spirit’s brokerage account. Please note that the market will, in all likelihood, have moved either up or down between the time you give the instructions to transfer and when the securities are received into Pacific Spirit’s brokerage account.

Once the securities are received in Pacific Spirit’s brokerage account, the securities will be sold as soon as possible. Pacific Spirit and its broker will work to minimize, as much as possible, any differences in the value of securities during the transfer and sale period.

## Timing

Please be aware that it is sometimes very difficult, if not impossible, to transfer securities in the last weeks of December. Avoid this risk by planning your gift well in advance.

## Further Information

If you have any questions or require further information about making your gift, please contact the Pacific Spirit office at [604]263-5377. If the office staff cannot answer your enquiry they will get someone else to contact you for assistance.

Here is the information your advisor will need to make the transfer of securities:

## Receiving Institution Information

Investment Firm: Credential Qtrade Securities Inc.

Address: 700-1111 West Georgia Street, Vancouver, BC V6E 4T6

CAD Account #: 522-627A-1

US Account #: 522-627B-1

Account Name: Pacific Spirit United Church

CUID or DTC: CRED/5083

Email: [CQCPsupport@aviso.ca](mailto:CQCPsupport@aviso.ca)

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# Pacific Spirit United Church – Gift of securities

2195 W 45<sup>th</sup> Ave  
Vancouver, BC V6M 2J4  
Phone: (604) 266-5377

Email address: [admin@pacificspirituc.com](mailto:admin@pacificspirituc.com)  
[www.pacificspirituc.com](http://www.pacificspirituc.com)

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## Letter of Direction

I, \_\_\_\_\_, hereby make a donation of securities in kind.

Please transfer the following position:

Description (1): \_\_\_\_\_

Quantity: \_\_\_\_\_ CUSIP/ISIN: \_\_\_\_\_

Description (2): \_\_\_\_\_

Quantity: \_\_\_\_\_ CUSIP/ISIN: \_\_\_\_\_

## Delivering Institution Information:

Delivering Institution Name: \_\_\_\_\_

Account Name: \_\_\_\_\_

Account #: \_\_\_\_\_ Delivering Institution CUID or DTC: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

## Receiving Institution Information:

Receiving Institution: **Credential Qtrade Securities Inc.**

Receiving Institution Address: **700-1111 West Georgia Street Vancouver, BC V6E 4T6**

Account Name: **Pacific Spirit United Church**

CAD donations account: **#522-627A-1** USD donations account: **#522-627B-1**

CRA Charity Registration #: **119130417RR0001** Receiving Institution CUID or DTC: **CRED/5083**

Contact Email: **CQCPSupport@aviso.ca**

## Contributing Donor Contact Information:

Donor's Legal Name (s): \_\_\_\_\_

Home Address: \_\_\_\_\_ (City), \_\_\_\_\_ (Prov), \_\_\_\_\_ (Postal Code)

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

## Contributing Donor Authorization:

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_