

Donation Instructions

Thank you for considering a gift of securities to the South Saskatchewan Community Foundation (SSCF).

3 STEPS TO MAKING YOUR DONATION

Step 1 - Please notify The South Saskatchewan Community Foundation Inc. office @ 306-751-4856 prior to the actual transfer of shares so we can ensure your transaction proceeds smoothly.

Step 2 – Have your financial advisor complete the attached *Authorization and Direction Form* for your signature. Once completed, send a scanned copy of the form to SSCF at: kara.marchand@sscf.ca

Step 3 – Have your financial advisor **INITIATE** the transfer of securities. Because the transfer is a charitable donation, SSCF's investment broker cannot initiate the transaction.

Valuation and Sale of Securities

The SSCF will issue a donation receipt to you for the value of the PROCEEDS of the sale of the securities. 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 the time the securities are received and sold. Once the securities and completed **Authorization and Direction Form** are received, the securities will be sold as soon as possible and the proceeds deposited into the identified fund.

Timing

Please be aware that it is logistically very difficult, if not impossible, to transfer securities in the last week of December. As well, certain securities such as mutual funds can take several months or more to transfer, depending on the complexity of the gift. Please avoid this risk by planning your gift well in advance.

Valuation and Sale of Securities

If you have any questions or require further information about making your gift, please contact Kara our Director of Finance & Administration at 306-751-4856. Thank you again for your trust in the South Saskatchewan Community Foundation.

AUTHORIZATION AND DIRECTION FORM

Please note: Your financial advisor **MUST INITIATE** the transfer of securities and forward a scanned copy of this completed form to kara.marchand@sscf.ca

Date: _____

This form authorizes the transfer of the following securities currently owned by me/us from my/our account # _____ to the South Saskatchewan Community Foundation Inc.'s account # **701-87576-1-2** at:

RBC Dominion Securities Inc., 1400, 333-7th Ave. SW, Calgary, AB T2P 2Z1

Contact: Shweta Kochhar - phone (403) 299-7142; E-mail: shweta.kochhar@rbc.com

Receiving Institution's DTC is 5002 and CUID is DOMA

I/We further authorize the delivering institution to discuss the details of this transfer with RBC Dominion Securities Inc. in order to facilitate this request.

Number of securities: _____

Name of security: _____

Name of your financial advisor: _____

Financial advisor's company: _____

Financial advisor's contact info: _____ (Tel.) _____ (Email)

Date of transfer: _____

Donor Name: _____ Daytime Telephone: _____

Address of Donor: _____

Street

City

Province

Postal Code

I/We understand that I/we will receive an Official Receipt for Income Tax purposes from the South Saskatchewan Community Foundation Inc., for the proceeds of the sale of the securities.

Donor signature: _____ Date: _____