



PO Box 85058, Albert Park PO
Calgary, AB T2A 7R7
Canada
DiscoveryHouse.ca

Gifts of Publicly Traded Securities

(INCLUDING STOCKS, BONDS, AND MUTUAL FUNDS)

Donor Information

Donor Name _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

Description of Securities (Equities/Mutual Funds/Bonds)

Security Description _____ Quantity _____

CUSIP/ISIN _____ CAN US Approximate market value \$ _____

Security Description _____ Quantity _____

CUSIP/ISIN _____ CAN US Approximate market value \$ _____

Broker / Delivering Custodian Information

Name of Firm _____ FINS# _____ Fax _____

Name of Broker _____ Broker Email _____ Phone _____

Account Name _____ Client Account Number _____

Recover. Reimagine. Rebuild.

DiscoveryHouse.ca

Charitable Registration #11882 3483 RR0001 | Alberta Societies Act Registration #50249381

Gift Designation

Highest Priority Needs of Discovery House (default); **OR**

Specific Designation: _____

Donor Authorization

This letter will confirm my intention to donate the following securities to Discovery House.

Signature: _____ Date: _____

Receiving Institution

To transfer securities, please advise your broker of the following details:

Richardson Wealth

Contacts: Rita Leung

Phone: 403-260-3823

Rita.Leung@RichardsonWealth.com

CUID: FIDC

Account#: H0B-PG00-A

Transfer Instructions

As gifts of securities must be donated “in kind” to qualify for elimination of gain, ensure your broker does not sell before transferring. The value of the donation will be based on the closing price of the security, on the day the securities are received by the organization’s custodian, in accordance with our Gift Acceptance Policy and Canada Revenue Agency. Discovery House will issue a charitable tax receipt when we are aware of your donation. To ensure prompt and accurate receipting of your donation, **prior to transferring securities to our account, please email this form to finance@discoveryhouse.ca.**

To initiate your electronic transfer, **please forward a copy of the completed transfer form to your broker/investment advisor. Please inform Discovery House once the transfer has been completed.** Unexpected and/or unidentifiable transfers may make it difficult for us to issue the appropriate tax receipt.

If you have any questions, please contact:

Sheryl Barlage (she/her)

Director of Campaign and Development

Discovery House Family Violence Prevention Society

cell: 403-837-8514 | email: sbarlage@discoveryhouse.ca