

# Donation of Publicly Traded Securities to the Society of Saint Vincent de Paul



Society of  
Saint Vincent de Paul

Thank you for supporting the Society of Saint Vincent de Paul with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple, and may result in significant tax savings for you.

## 1. Donor Information

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

## 2. Donor's Broker Information

Company Name \_\_\_\_\_

Broker Name \_\_\_\_\_

City \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Fax \_\_\_\_\_

a/c Number \_\_\_\_\_

## 3. Securities to Be Transferred

\_\_\_\_\_ shares of \_\_\_\_\_  
# of shares name of security / symbol

\_\_\_\_\_ shares of \_\_\_\_\_  
# of shares name of security / symbol

## 4. Transfer Securities in Kind to:

**Society of Saint Vincent de Paul, Investment Account # 654NEA1**

Desjardins Securities

Dealer Code FINS #

DTC 5028

CUID **VMDM**

Representative Code

I authorise this transfer as a charitable donation to the Society of Saint Vincent de Paul **654NEA1**. I agree that the Society of Saint Vincent de Paul, or its agent, may contact my broker for the purpose of concluding this transaction.

\_\_\_\_\_  
Signature of Donor/Client

\_\_\_\_\_  
Date

Additional comments/instructions:

### 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 Society's custodian, Desjardins Securities,
- Exception – Transfers from an Estate: Please contact the Society of Saint Vincent de Paul representative listed here for information regarding the valuation of securities.

### Complete this form

This information is needed for the transfer, tracking and receipting of your donation.

Email the completed and signed form to **your broker** and:

[Disnat.transfert.in.et.out@desjardins.com](mailto:Disnat.transfert.in.et.out@desjardins.com)

with copy to the **SSVP National Council**:

[national@ssvp.ca](mailto:national@ssvp.ca)

### Or mail the original form to:

Desjardins Online Brokerage  
1170 Peel St, suite 105  
Montréal QC. H3B 0A9

*The Society of Saint Vincent de Paul  
Charitable Registration number is:  
132410671 RR0001*