

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 # CUID **VMDM**
DTC **5028** 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.

Submission Instructions

1. Complete this form

This information is needed to process the transfer, track the donation, and issue an official donation receipt.

2. Email the completed and signed form to your broker.

3. Email a copy to the SSVP National Council at: national@ssvp.ca

Or mail the original form to:

SSVP National Council
2463 Innes Rd
Ottawa, ON K1B 3K3

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