



Charitable Donations of Securities/Mutual Funds to the Archiepiscopal Corporation of Regina and/or its related Charities

Procedure

To donate a publicly traded security (shares, mutual funds, etc.) to the Archbishop's Appeal, a Parish and/or a related charity of the Archdiocese of Regina, please complete and sign this form and follow these steps:

1. This form should be completed by the donor and submitted to the donor's broker.
2. Fax a copy to the Finance Office of the Archdiocese **1-888-443-3795**
3. The donor's broker **MUST** fax the form to the Archdiocese's broker at **(306)525-3273 (Attn: Alex Wlodarczyk)**.

Gifts can be made to:

- The Archbishop's Appeal (may include a designation for specific pastoral ministry, ie. Youth Ministry, Hospital Chaplaincy, Catechesis, Social Justice, Refugee Support, etc.)
- A Parish (please give name, address and purpose of designation, i.e. offertory, campaign, project)
- Catholic Charity in Southern Saskatchewan (ie. Catholic Family Services, Martha House, Visitation House. **Please consult with Finance Office to confirm. (306)352-1651 ext.210**)

The Archdiocese also includes individual funds and projects. Please contact our office to inquire about any specific projects you are looking to support.

Receipting Policy:

Canada Revenue Agency guidelines state that the charitable donation receipt for gifts of securities are calculated using the full fair market value of the securities on the date they are received into the charity's account. **All securities are sold as soon as possible following the transfer of ownership**. The funds are sent to the designated charitable entities in their entirety. The Archdiocese of Regina, our Churches and partner charities do not charge fees or take any commissions of any kind on the processing of gifts of securities.

Please call our office any time with questions:

Barry Wood, Financial Officer (306)352-1651 x218 or bwood@archregina.sk.ca



Archdiocese of Regina

Direction to Transfer Securities to Archiepiscopal Corporation of Regina

To make a gift of securities, please complete, sign and fax this form to the Archdiocese of Regina, Finance Office at 1-888-443-3795. If you have any questions, please contact Barry Wood, Financial Officer 306-352-1651 x218 or bwood@archregina.sk.ca.

Name of Donor: _____

Address: _____

City: _____ Province _____ Postal Code _____

Brokerage Firm: _____ Name of Broker: _____

You are hereby directed to transfer electronically the following securities representing a charitable gift from my account to: ScotiaMcLeod – Account number: 610-01886-1-1 FINS: T525 DTC: 4816. Contact: Alex Włodarczyk (306)761-6515.

| Name of Security(s) | Number of Share(s) | Canadian/US |
|---------------------|--------------------|-------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Date of Transfer: _____

Designation of Gift: _____

I hereby represent that there is no legal impediment to the transfer of these shares. Furthermore, there is no legal impediment to the immediate disposition of these shares by the Archiepiscopal Corporation of Regina under any provincial or federal securities legislation or regulation.

Date:

Signature of Donor(s)

Print Name