



Gifts of Securities Donor Instructions

Significant tax savings occur when you donate publicly traded securities directly to the Archdiocese or your parish. Securities include stocks, bonds and mutual funds. Securities received by the Archdiocese are sold and the cash proceeds are used according to your wishes.

How to Make a Gift of Securities to the Archdiocese or your parish:

1. Notify the Archdiocese of your intention

When planning to make a gift of securities to the Archdiocese or your parish, please notify the Development Office at the Archdiocese at 604-683-0281 or plannedgiving@rcav.org. You will need to provide written intent with the Gift of Securities Authorization Form stating where the cash proceeds from your gift are to be directed. The Archdiocesan Development team will facilitate your gift to ensure the transfer process is smooth and a timely tax receipt is issued.

2. Advise your broker

Advise your broker that you would like to make a gift of securities through a direct transfer to the Archdiocese of Vancouver. If your broker requires a written letter of direction you can refer to the Archdiocese of Vancouver Gifts of Securities Authorization form attached.

To transfer securities electronically, your broker will need the following information:

Stewart D. Hayashi, Advisor and VP
RBC Dominion Securities
Tel: 604-257-7613
Email: stewart.hayashi@rbc.com

Account Name: Roman Catholic Archbishop of Vancouver
Account #: 803-21488-12

** Should you have paper stock certificates, please contact us and we will make alternative arrangements.*

3. Charitable tax receipt

Shares received by the Archdiocese are immediately sold and the net proceeds are directed to the parish or Archdiocesan priority according to your wishes. Please note that **brokerage commission may be charged by the Archdiocesan broker when the shares are sold**. You will receive a charitable tax for the close value of your securities on the date they are received into the Archdiocesan brokerage account.

Your generosity and support are greatly appreciated. Should you have any questions about gifts of securities, please contact the Archdiocese Development Office at 604-683-0281.



Gift of Securities Authorization Form

To ensure the transfer process is smooth and a timely tax receipt is issued, please send a copy of this completed form to plannedgiving@rcav.org before authorizing the transfer with your broker. You may also contact the Development Office by calling 604-683-0281 ext. 50316.

Name & Contact Details of Donor's Broker

TO: _____
Name of the Donor's Broker and Brokerage Firm

FINS# _____ Telephone _____ Fax: _____

FROM: _____ Acct #: _____
Name of Donor for charitable tax receiving purposes

Donor's Address: _____

City: _____ Prov: _____ Postal Code _____ Tel: _____

Email: _____

Instructions from Donor to Donor's Broker

I hereby give authority to deliver free as a charitable gift the following securities to the Archdiocese of Vancouver:

Securities Name	CUSIP#	# of Shares/Units to Transfer	Approx. Value

The donation is for the benefit of:

Project Advance at _____ in _____
Name of Parish City

Parish _____ in _____
Name of Parish City

Area of Greatest Need at the Discretion of the Archbishop of Vancouver

Other _____

Additional Comments: _____

Donor's Signature _____ Date _____

Please instruct your broker to send a copy of this completed form to our broker:

Stewart Hayashi , VP RBC Dominion Securities stewart.hayashi@rbc.com