



# Gift of Publicly Traded Securities Roman Catholic Diocese of Victoria

To donate publicly traded securities and mutual funds, please follow the procedures below:

1. Instruct your broker to transfer securities to The Diocese of Victoria brokerage account at Richardson GMP
2. Complete this form and send a copy to the Diocese Finance Office (Fax to 250-479-5423 or email [leahm@rcdvictoria.org](mailto:leahm@rcdvictoria.org)).

## INFORMATION ABOUT YOU

Name

Street Address

City

Province

Postal Code

Phone

Email address

Designated Recipient (i.e., Diocese, name of parish or school)

## DESCRIPTION OF SECURITIES

Type of Security

Number of Shares

Name of Security / Shares

Date of Transfer

Broker's Name

Brokerage Firm

CUID or DTC

Account Number

Broker's Phone

Broker's Fax/Email

### PLEASE NOTE

- We are unable to issue an official receipt for tax purposes until the transaction is complete
- For privacy reasons, your broker cannot divulge your (client) contact information to us
- Tax receipts will be based on the closing price of shares the day they are received in our brokerage account

Canada Revenue Agency Registered Charity # 12995-0804-0001

## SECURITIES TO BE TRANSFERRED TO THE ACCOUNT OF THE DIOCESE OF VICTORIA

Contact: James Fray at Richardson GMP Ltd  
(250) 419-4260 Toll Free 1-877-419-2250  
Email [jay.fray@RichardsonGMP.com](mailto:jay.fray@RichardsonGMP.com)  
GMP Securities LP  
CUID — GMPT  
Dealer Rep — JR05  
Account — 50G-5AP0-A Canadian securities  
Account — 50G-5AP0-B US securities

Contact Leah MacKenzie, CFO  
Diocese of Victoria  
(250) 479-1331 ext 231  
Email: [leahm@rcdvictoria.org](mailto:leahm@rcdvictoria.org)

## SIGNATURE

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date