



**COMPANIONS
OF THE CROSS**



Instructions to Donate Publicly Traded Securities

The Companions of the Cross greatly appreciates your support. This form outlines the process to make your donation of stock(s) as seamless as possible.

Step 1: Fill Out the Form

One form for each security type. Each form must include the donor's signature.

Step 2: Send the Form to Your Broker

Share a copy of the signed form with your broker. **Your broker or financial advisor must initiate the transfer** of shares/units to the Companions of the Cross Scotia iTrade account.

Step 3: Send a Copy to the Companions of the Cross

Send a copy of the signed form to:

Dan Potvin

*Executive Director of Donor Relations
(See contact details below)*

Donor Information

NAME

STREET ADDRESS

CITY

PROVINCE

POSTAL CODE

TELEPHONE (HOME)

TELEPHONE (WORK)

EMAIL

Companions of the Cross Receiving Broker Information

**Scotia iTrade Companions of the Cross
Account #: 570-39469**

Transit **75168**

Dealer Code: **9155**

P.O. Box 4002

CLEAR STREAM #: **52065**

Station A

FINS #: **T085**

Toronto, ON

DTC #: **5011**

M5W 0G4

CUID: **SCOT**

Donor Securities Transfer Details

FULL NAME OF THE SECURITY

CUSIP #

MARKET SYMBOL

NUMBER OF SHARES/UNITS TRANSFERRED

DATE OF THE TRANSFER (APPROX.)

Companions of the Cross Office / Contact Information

For assistance please contact:

Dan Potvin, *Executive Director of Donor Relations*
(Major Gifts, Gifts of Stock, Estate Gift Planning)

Toll-free: (866) 885-8824

Local: 613-728-3175 (EXT. 24)

E-mail: dpotvin@companionscross.org

Address: 199 Bayswater Ave, Ottawa, ON K1Y 2G5

CRA Registered Charity #: 11887 1441 RR0001

Client Authorization — *I/we hereby request and authorize the transfer of the securities described above as charitable donation to the Companions of the Cross.*

SIGNATURE OF ACCOUNT HOLDER

SIGNATURE OF ACCOUNT HOLDER (IF JOINT)

DATE

DATE