

## **Donation of Publicly Traded Securities to DOGWOOD INITIATIVE**

Thank you for your interest in donating securities to Dogwood Initiative. Publicly-traded securities include stocks, bonds or mutual funds. Gifts of securities to registered Canadian charities are not subject to capital gains tax making it more advantageous to the donor to donate the securities in-kind.

Donations to Dogwood Initiative are received through the Institute for New Economics Public Research Association Inc. acting as a fiscal sponsor by operating a designated fund, “The Dogwood Initiative Fund” on behalf of the Dogwood Initiative.

### **Directions:**

- 1) Complete the attached form and deliver it to your broker or financial advisor directing them with regard to your wish to make a gift of securities to Dogwood Initiative. You may need your broker’s assistance to complete this form or you can call us.
- 2) Your broker should contact and deliver the form to our custodian,—Stephen Whipp Financial at ManuLife Securities Inc.
- 3) Once the securities have been transferred to our brokerage account, ManuLife Securities will advise us in writing of the receipt of the securities and the closing market value on the day they were received into our account.
- 4) We will issue an official receipt to you, for income tax purposes, for the value as determined by ManuLife Securities.

### **Contact Information:**

Dogwood Initiative: Don Gordon, Development Manager (250) 370-9930 x 28  
[don@dogwoodinitiative.org](mailto:don@dogwoodinitiative.org)

ManuLife Securities: Stephen Whipp (250) 405-3550 [stephen.whipp@manulifesecurities.ca](mailto:stephen.whipp@manulifesecurities.ca)





## Donation Form for Gifts of Securities

DATE: \_\_\_\_\_

**TO:**

Delivering Firm (Donor's Broker) \_\_\_\_\_

Branch: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**FROM:**

Name of Donor: \_\_\_\_\_

Account # \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PLEASE TRANSFER THE FOLLOWING SECURITIES IN KIND:

\_\_\_\_\_ shares of \_\_\_\_\_  
(number or dollar amount of shares) (name of security)

TO THE BROKERAGE ACCOUNT OF INSTITUTE FOR NEW ECONOMICS PUBLIC INTEREST RESEARCH ASSOCIATION INC. **Account #N174497A**

**Contact:** Stephen Whipp, CFP - Stephen Whipp Financial at ManuLife Securities

2826 Bryn Maur Rd, Suite 200, Victoria, BC V9B 3T4

Telephone: (250) 405-3550 Toll Free: 1-866-405-1988

Facsimile: (250) 386-3550 Email [stephen.whipp@manulifesecurities.ca](mailto:stephen.whipp@manulifesecurities.ca)

This transfer is a charitable donation to The Institute for New Economics Public Interest Research Association Inc. 118969377 RR0001

Please direct my gift to the **Dogwood Initiative Fund**

**Donor's Signature:** \_\_\_\_\_