

Letter of Direction for Donation of Publicly Traded Securities to  
**The Synod of the Diocese of Niagara**  
Canadian and U.S. Listed Securities



*In order to initiate your gift transfer please complete this form to send to your broker (if eligible) and to The Geoffrey Pennal Advisory Group using the email address indicated below.*

*Your broker will be able to provide certain needed information, such as the CUSIP and the FINS numbers for the securities.*

*Please note that your broker must initiate this transaction by transferring the shares to our broker.*

*Tax receipts may experience difficulties if the transfer of securities is unexpected or unidentifiable.*

*Your broker may contact our representatives at **CIBC Wood Gundy at 416-594-8686** with questions and/or concerns.*

*Please forward copies of this form to your Broker (if eligible).*

**Electronic Transfer of Shares from:**

Broker Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Brokerage Firm: \_\_\_\_\_

Account Holder Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

☐ I would like this donation to be anonymous

**Donor Information:**

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

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal: \_\_\_\_\_

Parish / Mission: \_\_\_\_\_

**Gift Designation:**

☐ The Synod of the Diocese of Niagara

☐ Specific Fund/ Purpose: \_\_\_\_\_  
(Please specify)

☐ Specific Parish / Mission: \_\_\_\_\_  
(Please specify)

**Securities to be Donated:**

Company / Fund: \_\_\_\_\_

CUSIP: \_\_\_\_\_ # Of Shares / Units: \_\_\_\_\_ Estimated Dollar Value: \_\_\_\_\_

**Delivery Instructions:**

Transfer to: CIBC Wood Gundy

FINS # : T002 / DTC # : 5030

CUID: WGDB

Contact: The Geoffrey Pennal Advisory Group

☎ Geoffrey Pennal (416) 594-8686

✉ [Geoffrey.pennal@cibc.ca](mailto:Geoffrey.pennal@cibc.ca)

**For The Synod of the Diocese of Niagara: 410-00072-12**

Authorization of Donor / Client - Please process this donation to The Synod of the Diocese of Niagara as soon as possible. I authorize The Synod of the Diocese of Niagara or its agents to contact my broker for the purposes of this transaction.

\_\_\_\_\_  
Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
day month year