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 and email to ***kim.waltmann@niagaraanglican.ca***

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
- kim.waltmann@niagaraanglican.ca
- christine.morrow@niagaraanglican.ca
- geoffrey.pennal@cibc.ca

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

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

THE SYNOD OF THE DIOCESE OF NIAGARA
252 JAMES STREET NORTH HAMILTON, ON L8R 2L3
HTTPS://NIAGARAANGLICAN.CA/DONATE