

## CHARITABLE DONATION OF SECURITIES IN KIND

### Donor and their Financial Institution complete Section A.

\*\*Donor provides their Financial Institution with the form and the Donor's Financial Institution (Delivering Institution) initiates the transfer. \*\*Donor's Financial Institution to please email a copy of the form to [donorservices@saskatooncommunityfoundation.ca](mailto:donorservices@saskatooncommunityfoundation.ca) and [martha.loewen@raymondjames.ca](mailto:martha.loewen@raymondjames.ca)

### Section A: DONOR & Delivering Institution Info

Donor Name: \_\_\_\_\_ Telephone: ( \_ ) \_\_\_\_\_  
Donor Address: \_\_\_\_\_ City: \_\_\_\_\_ Province: \_\_\_\_\_  
Postal Code: \_\_\_\_\_ Donor's Email: \_\_\_\_\_

### Delivering Institution Information:

Financial Advisor: \_\_\_\_\_ Advisor's Telephone: ( \_ ) \_\_\_\_\_  
Advisor Email: \_\_\_\_\_  
Financial Institution: \_\_\_\_\_ Client Account #: \_\_\_\_\_  
Financial Institution Address: \_\_\_\_\_  
Name of Security: \_\_\_\_\_ Number of Shares: \_\_\_\_\_  
Cusip/Security Code: \_\_\_\_\_  
Sending Firm: CUID #: \_\_\_\_\_ DTC #: \_\_\_\_\_ Dealer/Rep #: \_\_\_\_\_

**I understand that I will receive a receipt for tax purposes from the Saskatoon Community Foundation for the securities based on: the selling price if sold the same day as the securities are received OR if not sold the same day received, then the closing price of the date the securities were received. These securities have been donated to the Saskatoon Community Foundation without restriction and can be sold by the Saskatoon Community Foundation at any time considered appropriate.**

**I wish my donation to be directed to:**

Fund Name \_\_\_\_\_

**Signature of Donor(s):** \_\_\_\_\_ **Date:** \_\_\_\_\_

### Section B: Charitable Organization Information

Name of Registered Charity: **SASKATOON COMMUNITY FOUNDATION**  
Registered Charity Account #: **1B3-AX0A-0**  
Name of Receiving Brokerage Firm: **Raymond James Ltd.**  
Dealer/Rep: 9485 / 9F02 CUID: MSLT FINS # T089 DTC # 5076

\*We will work towards completing your request in a timely manner. Please allow 7-10 business days to process your request once we receive the completed form from your delivering institution. Securities that price or trade weekly, or monthly require additional processing time accordingly.