

## Donation of Publicly Traded Securities to North Peace Community Foundation

Thank you for your interest in donating securities to the North Peace Community Foundation. A gift of securities is a cost and tax effective opportunity to support the Foundation. By donating publicly traded securities (stocks or mutual funds), you eliminate the capital gains tax that becomes payable if you were to sell the appreciated securities in the market.

Please follow these directions to make a gift of securities to the North Peace Community Foundation:

- 1. Please notify the Foundation of your intention to make a gift of securities. We will facilitate your gift to ensure the transfer process is smooth and a timely tax receipt is issued.
- 2. Complete the attached form (you may need your broker's assistance) and advise your broker of your wish to make a gift of securities to the North Peace Community Foundation. If you do not have a broker, please complete this form, and send it directly to your delivering institution.
- 3. Your broker or delivering institution will deliver the form and securities to our custodian, Fidelity Clearing Canada (Fidelity) ULC. Please email a copy of the completed form to the North Peace Community Foundation at susan@northpeacecf.com and notify when the transaction is complete.
- 4. Upon receipt of the transferred securities (which may take up to two days or a few weeks in the case of mutual funds), the Foundation will issue you a tax receipt for the value of the securities on the date they were received in the Foundation's account.
- Securities received by the Foundation are immediately sold and the cash proceeds are invested in the Foundation's account in accordance with the Foundation's investment policy.

Thank you again for your generosity in donating to the North Peace Community Foundation. If you have any questions or concerns, please contact:

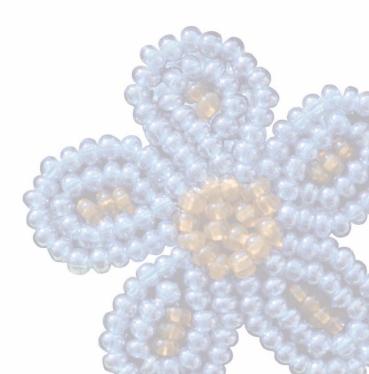
Susan Adams (Lehman)
Executive Director
North Peace Community Foundation.
e: susan@northpeacecf.com t: (778) 576-1669

c/o 10631 – 100 Street, Fort St. John, BC, V1J 3Z5 Phone: (778) 576-1669 | Toll-Free: (866) 558-8488 Charitable Registration: 790734107RC001



## LETTER OF DIRECTION AND AUTHORIZATION Re: Transfer of Bonds, Shares or other Securities

| account held by   | of the following securities currently owned by me FROM i   | my         |
|---|--|------------|
| TO account <b>F2E0601A</b> (Cdn\$) for Clearing Canada ULC. | the North Peace Community Foundation held with Fidelit   | ī <b>y</b> |
|   | posited to the Fund (t<br>stributed in accordance with the terms of my Fund Agree<br>Foundation. |            |
| Yours truly,  |  |            |
| Donor's Name (please print)                                 | Donor's Signature  |            |
| Donor's Address   |  |            |
| Donor's Telephone #:  | Donor's Email:   |            |





| l,  |                | , HEREBY MAKE A DONATION OF  |  |
|---|----------------|------------------------------|--|
| SECURITIES IN KIND. PLEASE TRANSFER THE FOLLOWING POSITION: |                |                              |  |
| Description (1):  |                |                              |  |
| Quantity:   | CUSIP/ISIN:    |                              |  |
| Description (2):  |                |                              |  |
| Quantity:   | CUSIP/ISIN:    |                              |  |
| Description (3):  |                |                              |  |
| Quantity:   | CUSIP/ISIN:    |                              |  |
|   |                |                              |  |
|   |                | Delivering Institution CUID: |  |
|   | Contact Email: |                              |  |
|   |                |                              |  |
|   |                |                              |  |
| Receiving Institution:                                      |                |                              |  |

Receiving Institution Name: Fidelity Securities Canada ULC

Receiving Institution Address: 483 Bay Street, Suite 200, South Tower, Toronto, ON M5G 2N7

Account Name: North Peace Community Foundation

Account #: **F2E0601A** CRA Charity Registration #: 790734107RC001

Receiving Institution CUID: FIDC Receiving Institution DTC: **5040** 

Contact Email: acctransfer.fcc@fmr.com

Contact Fax: 426.217.7440

- 1. Forward the signed authorization to your Investment counsel/manager.
- 2. Please forward a copy of the signed authorization by email to:

Susan Adams (Lehman) Executive Director North Peace Community Foundation.

e: susan@northpeacecf.com