



MacNab Street Presbyterian Church

The Church in the heart of the community with the community at heart

Gift of Publicly Traded Securities

(Donors, have your **broker**** complete with you and for you – print only.)

Why Gift Publicly Traded Securities?

Gifts of publicly traded securities are a tax-efficient* way to give now to vitally needed ministries or as an enduring legacy.

The fair market value of your charitable gift is determined on the day that the Church receives the shares into its investment account. This value may be higher or lower than the estimated return.

The net proceeds** of your donated securities will be received to you. It will determine the amount of your gift directed to your chosen beneficiaries such as **Congregational Support** or other **Specific Projects**.

* the capital gain inclusion rate is reduced to zero.

**i.e. 'proceeds of disposition' per CRA tax form t1170-17.

Donor Instructions

Please have your broker complete the form by entering what is called for in each line. Provide data starred with an asterisk *. Then forward to your broker. Do not sign until your broker has filled in delivering requirements and reviewed the document with you. Keep a copy. Your broker MUST send a redacted copy to the Church Trustee so that they can act on your behalf. Church Trustee Kevin Russell welcomes your queries.

For Your Consideration

I/(we) would be interested in learning how to share this experience of making a planned gift with others.

Yes No

To: _____

(Name of my brokerage company)

Contact: _____ E-mail: _____

(Name of my personal broker)

Address: _____

(Address of brokerage company)

Tel: _____ Fax: _____ DTC Participant #: _____

My/Our Client Nonregulated Account #: _____

Instructions to Donor's Delivering Broker

I/we hereby give authority to deliver free the following securities to MacNab Street Presbyterian Church's Investments Custodian: National Bank Independent Network; 130 King St W. Suite 3000, Toronto ON, M5X 1J9; Contact: NBINPMSupportON1, Toll Free: 1-844-451-3505, or NBINPMSupportON1@bnc.ca.

DTC Participant: 5008; CUID: NBSC; FINS: T080 for credit to CAD Account: 6C7S55A or USD Account 6C7S55B, both accounts of MacNab Street Presbyterian Church, 116 MacNab St S, Hamilton, L8P 3C3 Charitable Registration # 88971 6049 RR0001.

Security: _____ *Market Symbol: _____

CUSIP #: _____ Type: _____ Class (if any): _____

Number of Shares/Units: _____ Exchange: _____

Estimated Market Value: CDN \$ _____

*Donor/Client Information

Names: _____

(donor/client for charitable receipting purposes)

Full Address: _____

Phone: _____ E-mail _____

MacNab Street Presbyterian Church Envelope #: _____

* I/we wish the beneficiaries of my gift (see side panel, if more than one, state percentages,) to be:

Authorization of Account Holder(s)

Signature _____ Date: _____

Signature _____ Date: _____

****Broker, in the interests of client privacy and quick acknowledgement please redact client account information and send redacted PDF to Church Trustee kevinrussell.trustee@cogeco.ca**