



Estate Gift of Publicly Traded Securities to Congregations, Missions and Ministries of The Presbyterian Church in Canada

To facilitate an estate's gift transfer, please complete this form and give it to the estate's broker who will initiate the transfer. Please return a copy by **fax (416-441-2825)**, **email: plannedgiving@presbyterian.ca** or by mail to the address below:

The Presbyterian Church in Canada (PCC)
Stewardship & Planned Giving Office
50 Wynford Drive
Toronto, Ontario M3C 1J7

Unexpected and/or unidentifiable transfers may make it difficult for The PCC to issue the appropriate tax receipt. Please contact the Stewardship and Planned Giving Dept. (1-800-619-7301) with any questions about the gift of securities transfer process.

All donated securities are sold upon receipt. The net proceeds from the sale of an estate's donated securities will be the amount of the estate's gift and will be directed to the chosen beneficiaries (e.g. the deceased's congregation or Presbyterian World Service & Development or *Presbyterians Sharing* etc.). This value may be higher or lower than the value of the estate's charitable gift receipt which is determined by the closing price on the day that the PCC receives the shares into our account.

Your broker may contact Scotia McLeod (Leo Lau, 1-800-665-1856, leo.lau@scotiawealth.com) with any questions or concerns.

Thank you for your gift!



The Presbyterian Church in Canada

(please print)

To: _____
Name of the estate's brokerage company

Contact: _____
Name of the estate's broker

Address: _____

Telephone Number: _____ Fax: _____

My Client Account Number: _____

Instructions to Broker

I hereby give authority to deliver free the following securities to Scotia McLeod (40 King Street W., 48th Floor, Toronto, ON M5H 3Y2) for credit to account # 433-91893-10 of The Presbyterian Church in Canada. CUID #: SCOT, FINS #: T085

Security: _____ CUSIP#: _____

Market Symbol: _____ Number of Shares/Units to transfer: _____

Estate Information

Name(s) of the estate for charitable receipting purposes

Full Address: _____

Phone: _____ E-mail: _____

Congregation: _____

Gift Designation

The estate directs the beneficiary(ies) of the gift to be (if more than one, state percentages):

The estate wishes / does not wish (please circle one) the beneficiary(ies) to be informed of the identity of the deceased.

Yes No (please circle one)

Authorization of Executor/Executrix/Trustee(s)

Signature(s) Date

Original to the estate broker

Copy to: The Presbyterian Church in Canada
Stewardship and Planned Giving Office
50 Wynford Drive, Toronto, Ontario M3C 1J7 (fax: 416-441-2825)