



Estate Gift of Publicly Traded Securities to The Presbyterian Church in Canada

Mail: Stewardship and Planned Giving
The Presbyterian Church in Canada
50 Wynford Drive, Toronto, ON M3C 1J7

Phone: (416) 441-1111 or 1-800-619-7301
Fax: (416) 441-2825
Email: plannedgiving@presbyterian.ca

The Presbyterian Church in Canada accepts gifts-in-kind of appreciated securities for its ministries, missions and congregations. To facilitate your gift transfer, please complete this form and send: 1) A copy to your broker who will initiate the transfer. 2) A copy to Stewardship and Planned Giving Department. Unidentifiable transfers may make it difficult for the PCC to cash the stock and issue the tax receipt.

The charitable tax receipt will be issued using the market value of the stock on the day it is received in the PCC's brokerage account, with the number of shares and the date that it came in. The stock is sold shortly after it is received. The price of stock often changes – sometimes up, sometimes down – from the day it came into the PCC account and when it is sold. The net proceeds, less the broker fee, are transferred to the PCC and then allocated as designated. The PCC does not charge anything for processing the donation.

For general questions, please contact the Stewardship & Planned Giving Department. Your broker may also contact Scotia McLeod (Zameer Zakiuddin, 1-800-665-1856, zameer.zakiuddin@scotiawealth.com) with any questions or concerns.

NOTE: The PCC acknowledges donors once the stock is sold. If you haven't received an acknowledgement two weeks after the stock is transferred out from your investment account, contact the Stewardship & Planned Giving Department.

Please TYPE or PRINT

To: _____ (Name of the estate's brokerage company)

Contact: _____ (Name of the estate's broker)

Address: _____

Telephone: _____ 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, DPC #: 5011

Security: _____ CUSIP#: _____

Market Symbol: _____ No. of shares/units or
total value to transfer: _____

Estate Information

Full name(s) and address of the estate for receipt: _____

Telephone: _____ Email: _____

Gift Designation (indicate amount or % ****Please ensure the total equals 100%****)

Presbyterians Sharing: _____% Presbyterian World Service & Development: _____%

Gifts to congregation or ministry: (may list multiple, specify the percentage for each) _____

Please inform the beneficiaries of the identity of the deceased. Yes No

Authorization of Executor/Executrix/Trustee(s)

Signature(s)

Date

Original form is sent to the estate's broker A copy is sent to The Presbyterian Church in Canada