Gifts of Securities: Letter of Direction

Date: _____

National Bank Financial Wealth Management
911 Golf Links Road, Suite 201
Ancaster, Ontario
L9K 1H9
Attn: Catherine Moskal

Dear Catherine:

Re: Charitable donation

Please accept this transfer as a charitable donation to your account **11-Y03NA, "Roman Catholic Episcopal Corporation of the Diocese of Hamilton In Ontario, One Heart, One Soul."**

Please donate _____ shares/units of _____

Please direct my donation to:

    My Parish (please list name and city) _____

    Unrestricted Gift (not to be credited toward a particular Parish campaign.)

Donor Name & Address

_____

_____

_____

Delivering Institution Information

Delivering Institution _____

Contact Information _____

Client Account Number _____

Donor Authorization

I/we hereby request and authorize the transfer of my account and its investment as described above. I/We hereby consent to the Delivering Institution providing all information regarding this transfer to the Receiving Institution. These securities are being donated to the One Heart, One Soul Campaign of the Roman Catholic Episcopal Corporation of the Diocese of Hamilton in Ontario for the purpose expressed above, and I understand that I will receive a charitable tax receipt for the full value of these securities on the date received, and that these securities can be sold at any time considered appropriate by the receiving charity.

_____   _____
Signature(s)   Date

Donor/Broker Instructions

Please complete this letter either by typing in the text boxes provided or by printing the letter and filling it out by hand.

This letter, once completed, can be used by your broker to initiate the transfer. The letter must also be sent by mail, email, or fax to our Receiving Institution:

National Bank Financial
Wealth Management
911 Golf Links Road, Suite 201
Ancaster, ON   L9K 1H9
Attention: Catherine Moskal
catherine.moskal@nbc.ca
Phone: 905.648.3796
Fax: 905.304.4388

National Bank Financial
Dealer 9139/ Advisor UYAA
CUID NBCS
DTC 5008

Please note that the donor will receive a charitable tax receipt from the Diocese for the full value of the securities on the date of transfer. Charitable tax receipts are sent before February 28 in the year following the year in which donations are made (i.e. February 28, 2020 for donations made in 2019.)