



## *Charitable Donations of Securities/Mutual Funds to the Archdiocese of Toronto and/or its related Charities*

### **Procedure**

To donate a publicly traded security (shares, mutual funds, etc.) to a Parish and/or a charity of the Archdiocese of Toronto, please complete and sign this form and do the following:

1. Fax a copy to the Archdiocese, Attn: Quentin Schesnuik (416-934-3412)
2. CIBC Trust: Attn Kelly Mason (416-861-7058)
3. Mail the original to your broker

Gifts can be made to:

- A Parish (please give name, address and purpose of designation, i.e. offertory, campaign, project)
- The ShareLife Trust
- The Shepherds' Trust
- St. Augustine's Seminary
- The St. Michael's Choir School

The Archdiocese also includes many individual funds and projects. Please contact our office to inquire about any specific projects you are looking to support.

When filling out the form, your broker will supply you with the CUSIP number but this is not mandatory. The most important item for us to have is the contact information for your broker. If your broker is looking for our financial information, please have them contact us directly. Please do not call CIBC Trust directly.

### **Policy**

Canada Revenue Agency guidelines state that the charitable donation receipt for gifts of securities are calculated using the full fair market value of the securities on the day they are received into the charity's account.

**All securities are sold as soon as possible following the transfer of ownership.** The funds are sent to the designated charitable entities in their entirety. The Archdiocese of Toronto, our Churches and charities do not charge fees or take any commissions of any kind on the processing of gifts of securities.

Please call our office any time with questions:

**Quentin Schesnuik, Manager of Planned Giving and Personal Gifts, at (416) 934-3411  
Toll-free at 1-800-263-2595 or via e-mail at [qschesnuik@archtoronto.org](mailto:qschesnuik@archtoronto.org)**