



# Archdiocese of Toronto

## ***Giftng Securities to the Church is as easy as 1,2,3!***

Below are the steps to donate a publicly traded security (shares, mutual funds, etc.) to a parish and/or a charity of the Archdiocese of Toronto:

### **Step 1 (You)**

1. • Complete the Letter of Direction form (the form is below)\*
  - Fax or email copies to:
    - Your broker
    - The archdiocese, Attn: Peter Okonski (F: 416-934-3412) or email: [development@archtoronto.org](mailto:development@archtoronto.org)
    - CIBC Wood Gundy Attn: RK & Associates (F: 416 369-8501) or e mail: [Jenna.Gold@cibc.com](mailto:Jenna.Gold@cibc.com) and [Tomasz.Krzyzanowski@cibc.com](mailto:Tomasz.Krzyzanowski@cibc.com) and [Joao.Rodrigues@cibc.com](mailto:Joao.Rodrigues@cibc.com)

\*Your broker may also have a form for you to sign. Please inquire with them.



### **Step 2 (Your Broker)**

2. • Your broker transfers your securities from your account into the Roman Catholic Episcopal Corporation for the Diocese of Toronto account\*

***\*NOTE: We cannot access your account to retrieve your securities.  
Your broker must initiate the transfer while we set up to receive.  
Please mention this to your broker!***



### **Step 3 (The Archdiocese of Toronto)**

3. • Our broker at CIBC Wood Gundy receives your securities and sells them
- Once the trade settles, the proceeds from the sale are wired into the Archdiocese of Toronto's account
- We then prepare your tax receipt and disburse the monies to the parish(es)/charities you have listed on the Letter of Direction

***It's that easy!***

## Questions and Answers:

### Where can I direct my gift?

Gifts can be made to:

- A parish (please give name, address and purpose of designation, i.e. offertory, building fund, etc.)
- Family of Faith campaign
- ShareLife
- The Shepherds' Trust
- St. Augustine's Seminary
- 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.

### On the Letter of Direction it asks for a CUSIP number. What is this?

A CUSIP number is used to identify a security. Your broker will be able to supply it to you. While helpful, the CUSIP number is not mandatory for your donation to be made. If you can't get it, don't worry. The most important item for us to have is the contact information for your broker.

### How is my tax receipt calculated?

Canada Revenue Agency (CRA) guidelines state that the charitable donation receipt for gifts of securities are calculated using the fair market value of the securities on the day they are received into our account.

All securities are sold as soon as possible following the transfer of ownership. This is the amount that goes to the Church. A full transaction report will be sent to you along with your tax receipt.

### Does the Archdiocese of Toronto charge any fees to do this?

No. The Archdiocese of Toronto does not charge fees or take any commissions of any kind on the processing of gifts of securities as it is a service we provide. The only cost is the brokerage fee from the broker.

### What is the archdiocese's legal name and charitable registration number?

The legal name of the Archdiocese of Toronto is: Roman Catholic Episcopal Corporation for the Diocese of Toronto, in Canada. Our charitable registration number is 10791 0259 RR0001.

### Additional questions? We can be reached at:

Peter Okonski, Manager of Planned Giving and Personal Gifts, at (416) 934-3400, ext. 519  
or toll-free at 1-800-263-2595 or email at [development@archtoronto.org](mailto:development@archtoronto.org)  
Or Rhonda Sogren, Development Coordinator, at ext. 561 or email at [rsogren@archtoronto.org](mailto:rsogren@archtoronto.org)

**We look forward to assisting you!**



# ARCHDIOCESE OF TORONTO

1155 Yonge Street, Toronto, ON M4T 1W2

## Charitable Donations of Securities/Mutual Funds LETTER OF DIRECTION

I wish to make a charitable donation to the Archdiocese of Toronto for further credit to:

**Please direct my gift to:**

*[Archdiocese of Toronto is the Agent for the above named Charity(ies)]*

To facilitate this donation, I the undersigned donor hereby authorize and direct you to transfer the following securities/mutual funds to CIBC Wood Gundy for the Archdiocese of Toronto from my account as follows:

### Donor Information

<b>Name:</b>			
<b>Address:</b>			
<b>Tel#:</b>		<b>Email:</b>	

### Broker Information

<b>Firm Name:</b>			
<b>CUID#:</b>			
<b>Client Account #</b>			
<b>Broker Contact Name:</b>			
<b>Tel#</b>			
<b>Fax#</b>		<b>Email:</b>	

### Security Information

<b># Shares/Units:</b>			
<b>Description of Security:</b>			
<b>Class:</b>			
<b>CUSIP:</b>			

### Transfer Information

**For all CDN / US Securities:**

<b>Account Name</b>	Roman Catholic Episcopal Corporation for the Diocese of Toronto	<b>FINS #</b>	T079
<b>Brokerage</b>	CIBC Wood Gundy	<b>CUID</b>	WGDB
<b>Brokers</b>	RK & Associates	<b>DTC #</b>	5030
<b>Brokerage fee</b>	\$150.00	<b>Account</b>	419-01529-10
		<b>Dealer Code</b>	9280
		<b>Rep Code</b>	DYX

✓		
<b>Signature of Donor</b>	<b>Signature of Donor</b>	<b>Date</b>

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, send to your broker and e-mail /fax a copy to CIBC Wood Gundy attn.: RK & Associates: FAX 416 369-8501 or EMAIL: [ [Jenna.Gold@cibc.com](mailto:Jenna.Gold@cibc.com) and [Tomasz.Krzyzanowski@cibc.com](mailto:Tomasz.Krzyzanowski@cibc.com) and [Joao.Rodrigues@cibc.com](mailto:Joao.Rodrigues@cibc.com) ], and to the Archdiocese of Toronto: [development@archtoronto.org](mailto:development@archtoronto.org), Attn: Rhonda Sogren \* ☎ 416-934-3400 x 561 \* Fax 416-934-3412 \*