



## **Donation of Publicly Listed Securities to the Quadra Island Foundation**

*Thank you for your interest in donating securities to the Quadra Island Foundation. A gift of publicly listed securities, such as stocks, bonds or mutual funds can be made to the Foundation. Please follow these instructions on the firsts two pages to transfer securities as a donation:*

### **FORM 1 and SECURITIES TRANSFER**

1. **Please fill out and send Form 1 "Donor(s) Instructions to Donor's Broker" (see page 3) to your broker with a copy to: Board Chair, Michael Mascall:**  
[info@quadraislandfoundation.ca](mailto:info@quadraislandfoundation.ca) or by mail to: Quadra Island Foundation, PO Box 402, Heriot Bay, BC, V0P 1 H0.
2. *Have your broker send the filled copy of Form 1, and the securities, directly to our Investment Advisor.*
  - a. *You may need your broker's assistance to complete Form 1, or, if we can be of assistance to you, please call us at 250-285-3060.*
  - b. *Please give your broker permission to release your name to the Quadra Island Foundation (see bottom of Form 1).*
  - c. *Once the securities have been transferred to the Foundation's brokerage account, QIF financial advisers will advise the Quadra Island Foundation in writing of the receipt of the securities and the closing market value on the day the securities were received into our account.*

### **FORM 2 and TAX RECEIPT**

3. **Please fill out and send Form 2 "Donor(s) Direction to Quadra Island Foundation" (see page 4) to the Board Chair, Michael Mascall:**  
[info@quadraislandfoundation.ca](mailto:info@quadraislandfoundation.ca) Or, by mail to:  
Quadra Island Foundation, PO Box 402, Heriot Bay, BC, V0P 1 H0.
4. *Quadra Island Foundation will issue an official receipt to the donor(s) for income tax purposes, for the value as determined by our financial advisors.*
5. *It is the Foundation's policy that securities, once received by the Foundation, may be sold or added to the Foundation's investment account in accordance with the Foundation's investment policies.*

**QUESTIONS? Please call us at 250-285-3060.**



## FORM 1: Donor(s) Instructions to Donor's Broker

Date \_\_\_\_\_

To: (Donor's Broker) \_\_\_\_\_

Branch Address \_\_\_\_\_

Name of Broker \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

Broker Account # \_\_\_\_\_

Donor Address \_\_\_\_\_

Donor Phone \_\_\_\_\_ Donor email \_\_\_\_\_

**With a copy of this form, please transfer the following securities in kind to Nicole Jeschelnick, Investment agent, Vancouver Island Foundation (Quadra Island Foundation Financial Advisor and Brokerage Account manager) 200-475 West Georgia Street, Vancouver, BC V6B 4M9, [Nicole.jeschelnik@vancouverfoundation.ca](mailto:Nicole.jeschelnik@vancouverfoundation.ca)**

\_\_\_\_\_ shares of \_\_\_\_\_  
(Number or dollar amount of shares) (Name of security)

\_\_\_\_\_ shares of \_\_\_\_\_  
(Number or dollar amount of shares) (Name of security)

I permit the release of my name to **Nicole Jeschelnick** and the Quadra Island Foundation.

Signature of Donor (1) \_\_\_\_\_ Signature of Donor (2) \_\_\_\_\_



**FORM 2: DONOR(S) DIRECTION TO QUADRA ISLAND FOUNDATION**

Date \_\_\_\_\_

THIS TRANSFER OF SECURITIES IS A **CHARITABLE DONATION TO THE QUADRA ISLAND FOUNDATION:**

**Charity/Business Number 71728 4079 RR0001**

**PERMANENT GIFTS**

PLEASE CATEGORIZE MY/OUR DONATION AS A PERMANENT GIFT TO THE QUADRA ISLAND FOUNDATION

For tax receipt purposes, this donation is in the name of:

\_\_\_\_\_ (Single Personal Name)

I /We wish my/our donation to be designated to:

\_\_\_\_\_ (Name of QIF Fund, if applicable)

Signature of Donor (1) \_\_\_\_\_

Signature of Donor (2) \_\_\_\_\_