www.sharelife.org

Gifting Securities to ShareLife is as easy as 1,2,3!

The Development Office of the Archdiocese of Toronto processes all gifts of securities for ShareLife. Below are the steps to donate a publicly traded security (shares, mutual funds, etc.) to ShareLife and have your parish campaign credited with the donation:

1.

Step 1 (You)

- Complete the archdiocese's Letter of Direction form (the form is below)*
- Fax or email copies to:
  - Your broker
  - The archdiocese, Attn: Quentin Schesnuik (F: 416-934-3412) or email: development@archtoronto.org
  - CIBC Trust, Attn: Andrew Kruczkowski (F: 416-861-7058) or email: Andrew.Kruczkowski@cibc.com

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

2.

Step 2 (Your Broker)

- Your broker transfers your securities from your account into the Archdiocese of Toronto's account at CIBC Trust*

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!

3.

Step 3 (The Archdiocese of Toronto)

- Our broker at CIBC Trust 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 ShareLife and credit the parish campaign you have listed on the Letter of Direction

It's that easy!

Questions and Answers:

Why is the securities donation form from the Archdiocese of Toronto?

The Development Office processes all securities gifts in the archdiocese, including ShareLife.

Can my parish's ShareLife campaign be credited with my donation?

Yes! Simply write: "ShareLife – credit (insert your parish name here)" on the form. We will also mail your pastor an acknowledgment letter. Your tax receipt will come from the archdiocese.

Can I consolidate all of my Church giving using securities?

Yes! Simply write on the form how you want your donation divided. Gifts can also be made to your parish (please give name, address and purpose of designation, i.e. offertory, building fund, etc.), Family of Faith campaign, The Shepherds' Trust, St. Augustine's Seminary, St. Michael's Choir School, etc. 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 then 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 does not charge fees or take any commissions as it is a service we provide. The only cost is the brokerage fee (you will receive a tax receipt for this amount).

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 it is 10791 0259 RR0001.

Additional questions? We can be reached at:

Quentin Schesnuik, Manager of Planned Giving and Personal Gifts, at (416) 934-3400, ext. 561 or toll-free at 1-800-263-2595 or email at development@archtoronto.org OR Elvira Foronda, Development Coordinator, at the same number, ext. 519 or email at eforonda@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:

[The 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 Trust Corporation and into the name of "CIBC Trust Corporation – In Trust for the Archdiocese of Toronto" from my account as follows:

Donor Information

Name:	
Address:	
Tel#:	

Broker Information

Firm Name:	
CUID#:	
Client Account #	
Broker Contact Name:	
Tel#	
Fax#	

Security Information

# Shares/Units:	
Description of Security:	
Class:	
CUSIP:	

Transfer Information

For all CDN / US Securities:

CIBC Mellon Global Securities Services Company

CDS FINS	T435
CUID	COMO
DTC #	954
CMS Account	CTSF1111002

For all Mutual Funds:

CIBC Wood Gundy Investment Centre

FINS #	T079
CUID	WGDB
DTC #	5030
Account	524-61993-18
Dealer Code	9280
Rep Code	QMT

Signature of Donor	**Signature of Donor**	**Date**

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 fax copies to the Archdiocese of Toronto
Attn: Quentin Schesnuik * ☎ 416-934-3411 * 📠 416-934-3412 * development@archtoronto.org
and to CIBC Trust Attn: Andrew Kruczkowski * ☎ (416) 309-4000 * 📠 416-861-7058 * Andrew.Kruczkowski@cibc.com