



ARCHDIOCESE OF TORONTO
Catholic Pastoral Centre
1155 Yonge Street
Toronto, Ontario M4T 1W2

ACCOUNTING & FINANCE, Suite 603
Tel (416) 934-0606 Fax (416) 934-3432

Procedures For Charitable Donations of Securities/Mutual Funds for the Archdiocese of Toronto Parishes and Related Registered Charities.

Thank you very much for your interest in donating to an Archdiocese of Toronto Parish, or related registered charity.

As you are aware, the May 2006 Federal Budget eliminated the tax on capital gains realized on donations of listed securities, including stocks and mutual funds, to registered charities.

The Archdiocese of Toronto will act as agent and process, on behalf of the recipient donee, donations to any of the following registered charities:

- Your local Parish (for offertory, capital campaign, or general parish needs)
- ShareLife
- The Legacy for Life Endowment Fund
- The Shepherds' Trust
- St. Augustine's Seminary
- Archdiocese of Toronto

(Other named recipients must be discussed with the Office of Stewardship Development before the Archdiocese accepts a donation on their behalf)

The Archdiocese of Toronto reserves the right to refuse a donation of listed securities to one or more of the Archdiocesan Charities.

Please follow the steps outlined below. If further assistance is required, please contact Paul Nazareth, Manager, Planned Giving & Major Gifts, Office of Stewardship Development, by Phone (416)934-3400 ext. 561, Fax: (416)934-3412 or via e-mail at pnazareth@archtoronto.org.

Complete and send the Charitable Donation Letter of Direction to your Broker.

A Letter of Direction must be completed in full in order to make a donation.

The Letter of Direction may be attached to these instructions, if not, it is available via:

- Website www.archtoronto.org - Click on [Web Instructions] and click on Letter of Direction.

- Phone Request – (416) 934-3400 ext. 561 (Office of Stewardship Development – Paul Nazareth) we can send the form via e-mail, regular mail or fax.

Instructions to Broker:

Fax or Mail Copy of Letter of Direction to:

1. Office of Stewardship Development -Attn: Securities Donation - by FAX (416) 934-3412 or MAIL to the Archdiocese of Toronto, Pastoral Centre, 1155 Yonge St., Toronto, ON M4T 1W2.
2. CIBC Trust Corporation by FAX (416) 861-7058 – Attn: Kelly Mason or MAIL to 55 Yonge Street, Toronto, ON M5E 1J4.

SECURITIES CERTIFICATE/S DONATION:

Transfer The Securities

You can transfer or deliver securities three (3) ways: Electronically, by Registered mail, or Hand deliver in person.

1. **ELECTRONICALLY** - To transfer the securities electronically:
 - Complete the attached **Letter of Direction** and send to your broker. A copy must be faxed, by your broker, to the Stewardship Development Department, Archdiocese of Toronto, and CIBC Trust Corporation at the numbers indicated on the form.
2. **REGISTERED MAIL** - To deliver the securities certificate by Registered Mail:
 - Security certificate/s which have already been transferred into the **name of the parish or related registered charity** can be sent to us without a signature or irrevocable power of attorney. Place the Security Certificate/s and the Letter of Direction in an envelope and send via **REGISTERED MAIL**.
 - Securities certificate/s in the **Donor's name - DO NOT SIGN** the securities certificate/s. Send the Securities Certificate/s to us in one envelope via Registered Mail. In a Separate Envelope Send a completed, signed and dated irrevocable securities power of attorney form, together with the completed securities donation Letter of Direction. (2 separate envelopes - via Registered Mail) to: Archdiocese of Toronto – Office of Stewardship Development - Securities Donations – Pastoral Centre, 1155 Yonge Street, Toronto, ON M4T 1W2.
 - An irrevocable **Power of Attorney** form is available either from your broker or on our website: www.archtoronto.org Click on Web Instructions, or call us at (416) 934-0606 extn. 561 - we can fax or e-mail the form to you.
3. **HAND DELIVER** - to deliver the securities (Securities Certificate/s) in person:
 - **DO NOT SIGN** the Security Certificate/s.
 - Contact the Office of Stewardship & Development at (416) 934-0606 extn.561 to arrange a time to deliver the Securities Certificate/s-irrevocable security Power of Attorney form and Securities donation Letter of Direction.
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MUTUAL FUND DONATIONS

Please Note: Mutual fund donations experience longer processing times. Please keep this in mind when donating at the end of the Calendar year.

The Stewardship Development Department will monitor the transaction with CIBC Trust Corporation to ensure it is completed in a timely fashion.

Once the transaction is completed, a cheque will be issued to the Archdiocese of Toronto as agent for the recipient charity by our custodian, CIBC Trust Corporation.

The Stewardship Development Department will co-ordinate the delivery of the proceeds to the recipient(s) as per the instructions provided by the donor on the Letter of Direction.

A charitable tax receipt will be issued by either the Archdiocese of Toronto (for donations directed to a local parish or to the Archdiocese) or the appropriate designated charity, and sent to the donor. The receipt will indicate the trading price of securities.

Thank you for your donation – Through this donation God will touch countless lives.