



CANADIAN
WOMEN'S
FOUNDATION

FONDATION
CANADIENNE
DES FEMMES

Canadian Women's Foundation

Stock Donation Acceptance Policy and Guideline

Introduction

This document applies to the receipt of stock donation through all fundraising activities of the Foundation, including: general donation, annual giving; planned gifts; special fundraising initiatives; and campaigns.

This guideline may be altered from time-to-time in accordance with changes in income tax legislation, CRA policy and/or guidelines related to charitable giving, or Foundation policy.

Acceptance of Shares

Canadian Women's Foundation (CWF) shall at all times reserve the right to accept or decline a donation of shares. As a general rule, the Foundation will only accept gifts of publicly traded stocks. **The value of such a donation is determined by the value of trading on the date of receipt of donation.**

Tax Advice

CWF will only provide reference on tax benefits. For specific tax advice on stock donations, donors should consult their advisors on the rules governing deductibility of these gifts.

Stock Disposition Policy

CWF Board decided and enforced the rule that all the stocks and securities CWF receives from the donors will be sold upon completion of the stock transfer WITHOUT exception.

Procedure

1. Authorization - Donor to complete the attached **Charitable Donation of Securities in Kind Form**, sign and send to the Foundation by email: philanthropy@canadianwomen.org
2. Notification - CWF will advise CWF brokerage firm about the transfer.
3. Disposition - CWF authorized officers will instruct the CWF brokerage firm to sell the stocks on the very same day or before the end of the next trading day just in case the transfer comes in late of the day.
4. Recording - CWF will record the transaction on the CWF securities schedule. Upon receipt of confirmation notice of the sale (normally within one week of the transfer) from the Brokerage firm, CWF will book the donation accordingly.
5. Receipting - CWF will issue receipt with name, number and value of shares and distribute it to the donor.

National Office | Bureau national
1920 Yonge Street, Suite 302
1920 Rue Yonge, Bureau 302
Toronto, Ontario, M4S 3E2
Telephone / Téléphone : 866-293-4483
Fax / Télécopieur : 416-365-1745

Toll free | Sans frais
Telephone / Téléphone : 1-866-293-4483
Fax / Télécopieur : 1-877-293-7490
TTY: 416-365-1732

www.canadianwomen.org
www.femmescanadiennes.org
info@canadianwomen.org



Charitable Donation of Securities in Kind

Client Transfer Services, 77 Bloor Street West, 6th Floor, Toronto, Ontario M4Y 1T2

Please complete this form for use as Authorization to facilitate a timely transfer. Transfer requests that do not contain the information requested herein may result in delayed deliveries. Please ensure a copy of any necessary supporting documentation is attached to your transfer request such as a Corporate Resolution with sample signatures for a corporate account, Powers of Attorney where the signing authority for an account differs from the client of record, etc.

Please transfer the following position:

Description (1): _____

Quantity: _____ CUSIP/ISIN: _____

Description (2): _____

Quantity: _____ CUSIP/ISIN: _____

Delivering Institution Information

Delivering Institution Name: _____

Account Name: _____

Account #: _____ Delivering Institution CUID or DTC: _____

Contact Name: _____ Signature _____ Phone Number _____

Receiving Institution Information

Receiving Institution Name: _____

Account Name: _____ Canada Revenue Agency (CRA) Charity Registration Number: _____

Account Number: _____ Receiving Institutions CUID or DTC: _____

Contact Name: _____ Signature _____ Phone Number _____

For Internal Use Only

DEALER/REP CODE _____	DELIVERING INSTITUTION _____
CUID _____ DTC _____ EUROCLEAR # _____	
CONTACT NAME _____	ADDRESS _____
CONTACT TELEPHONE _____	CONTACT _____ TELEPHONE _____

Additional Information: *Please include any additional Contact Information (if applicable).*

Contributing Client Authorization:

Client Signature: _____ Date: _____

RUSH - For Internal Use Only
Please fax a completed copy of this form to the Client Transfer Services department. The fax number can be found within the Charitable Donation procedures section of the Client Transfer Resource Centre.

TD Waterhouse Canada Inc.
Client Documentation Department
3500 Steeles Avenue East
Tower 2, 2nd Floor
Markham, ON L3R 0X1

The Canada Trust Company
Private Trust
Client Documentation Department
3500 Steeles Avenue East
Tower 2, 2nd Floor
Markham, ON L3R 0X1

Securities Transfer Client Disclosure

In our business we are dedicated to continually improving Client Service. This Client Disclosure and informational document was developed to help you understand the account transfer process. **It is important to read this document carefully before signing the section called CONTRIBUTING CLIENT AUTHORIZATION on this transfer form.** Should you have any questions after reading this document, please be sure to address your inquiries with your Receiving Institution's Investment Representative.

How long will my transfer take?

The time required to transfer your security(ies) will for the most part depend on the type of investment products you currently hold. Please note that all your assets may not all be transferred at exactly the same time.

Non-registered Accounts:

Under current IDA regulations, this type of transfer may **take approximately 10 business days from the time of receipt by the Delivering Institution**, if it is being delivered via the Automated Transfer Online Notification System (ATON). If the transfer is not being delivered via ATON, the length of time to complete the transfer could exceed 10 business days.

Types of Investment Products

Mutual Funds:

Currently, mutual fund products take longer to fully transfer, and may result in a possible delay into the charitable organization's account, due to the requirement of re-registering the mutual fund at the Fund Company. **On average mutual funds require 5 - 10 business days to transfer from the time the mutual fund power of attorney is received** by the Receiving Institution.

Guaranteed Investment Certificates & Term Deposits:

Generally, a Guaranteed Investment Certificate (GIC) **is not transferable IN-KIND (as is) prior to the maturity date.** Most GIC's must be transferred IN-CASH upon their maturity. Please check the terms and conditions with the Institution which currently holds your investment. If your GIC matures in more than 6 months' time, please submit your transfer request one month prior to maturity.

Other Investment Products:

There are many other investment products which may be non-transferable, non-redeemable or subject to other delays. Some of these products include Mortgages, Foreign Securities, and Non-transferable Bonds (minimum denomination requirements).

Rejected Transfers:

A transfer request may be rejected by the Delivering Institution for a number of reasons, such as, insufficient funds to cover fees, account not in good standing, i.e. undermargin, short position(s), etc. If for any reason your transfer has been rejected by the Delivering Institution, they may return the transfer request to the Receiving Institution unprocessed. **When the reason for the rejection has been rectified, the transfer process may begin again and the Delivering Institution may then have approximately 10 business days, from the date of receipt of the transfer documents to process the transfer.**

How much will it cost to transfer my security(ies)?

Transfer Fees:

Most institutions charge a transfer out fee at which the cost varies. It is important to ensure that you have sufficient funds available in your account at the delivering institution to cover your transfer and administration fees, as the delivering institution may reject the transfer unprocessed, thus creating a lengthy delay.