

**ROMAN CATHOLIC EPISCOPAL CORPORATION OF OTTAWA  
(ARCHDIOCESE OF OTTAWA)**

**LETTER OF INSTRUCTION – GIFT OF LISTED SECURITIES**

In order to initiate a transfer of securities, please complete this form with your broker. The **donor's broker is to initiate the transfer and fax or e-mail a copy to:**

Mr. Jules Dagenais, Archdiocese of Ottawa  
1247 Kilborn Place, Ottawa ON K1H 6K9  
Tel: 613 738-5025, ext. 249 / Fax: 613 738-0412  
E-mail: [jdagenais@archottawa.ca](mailto:jdagenais@archottawa.ca)

**DONOR'S INFORMATION**

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
(Street Number, Street Name, and Apt.) (City) (Province) (Postal Code)

E-mail address: \_\_\_\_\_

**DONOR'S BROKER INFORMATION**

Firm: \_\_\_\_\_ Client account number: \_\_\_\_\_

Contact person: \_\_\_\_\_

Fax Number: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
(Street Number, Street Name, and Apt.) (City) (Province) (Postal Code)

**DONATED SECURITIES**

Name of Securities: \_\_\_\_\_ CUSIP Number: \_\_\_\_\_

Number of shares: \_\_\_\_\_ Approximate value of donation: \_\_\_\_\_

**Allocation of donation**

Archdiocese of Ottawa most urgent needs \_\_\_\_\_ %

Parish Name: \_\_\_\_\_ %

Additional instructions: \_\_\_\_\_

I hereby authorize the transfer of the securities identified above to the Roman Catholic Episcopal Corporation of Ottawa, account # 66WXOWA (for Canadian shares) or #66WXOWB (for US shares) with National Bank Direct Brokerage Inc; CUID number NBCS, Broker/Dealer Number 9752, Tel: 1-800-363-3511.

I understand that I will receive an income tax receipt based on the closing price on the day the securities are transferred to the Roman Catholic Episcopal Corporation of Ottawa brokerage account. (Charity number: 12896 7353 RR 0001).

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_