

Do Your *Investments* Reflect Your *Values*?

Turn Unaligned Investments into **Meaningful Giving**



Do you hold investments?

If you hold investments that no longer align with your values, consider using them to make a lasting impact in your faith community that will have benefits now and for future generations.

By donating stocks to your local parish you can transform financial assets into charitable giving that supports ministries, outreach, and parish needs close to your heart.

Why Donate Stocks?



Align Your Wealth with Your Values

Redirect investments toward parish missions and ministries that make a positive impact and represent your beliefs and values.



Tax Benefits

Avoid capital gains tax and receive a charitable tax receipt.



Maximize Your Impact

Your donation goes further than cash gifts.

How It Works:

1

- Identify investments in places and/or companies that no longer match your values.

2

- Sell your stocks and donate the proceeds to your local Catholic parish.

3

- Receive a tax receipt and make a meaningful difference in your community.

Need Help?

We're here to simplify this process!

Join us in transforming investments into blessings.

Contact us at 902-429-9800 ext 309, Melissa Lunn, or email development@halifaxyarmouth.org to learn more.

Contact Us

902-429-9800 ext. 309 / development@halifaxyarmouth.org

Donation of Publicly Traded Securities to the Archdiocese of Halifax

Name and Contact Details of Donor's Broker/Delivering Custodian

TO: Roman Catholic Episcopal Corporation of Halifax
Charitable Registration Number 119109833RR0006

Attention: Leanne Moore & Nancy Wry-Wilton - CIBC Wood Gundy

Telephone: 902-460-3700 Email: leanne.moore@cibc.com
902-420-8220 nancy.wry-wilton@cibc.ca

Account # 271-04694-18 FINS# T079 CUID# WGDB DTC# 5030

Donor/Client Information

From: _____
Name of Donor/Client for Charitable tax receipting purposes

Full Address: _____

Telephone: _____ Email: _____

Instructions from Donor to Donor's Broker

I hereby give authority to deliver free as a charitable gift the following securities to CIBC Wood Gundy (FINS #T079) to the attention of Leanne Gillan for credit to account 271-04694-18 in the name of Roman Catholic Episcopal Corporation.

Please deliver free:

Full name of Security: _____ CUSIP # _____

Market Symbol: _____ Number of Shares/Units to transfer: _____

Designation of Funds: _____
(For General use of Archdiocese, special purpose/fund, or a specific parish,)

Authorization of Donor/Client

Signature Day Month Year

Please return a copy to Melissa Lunn

at the Archdiocese of Halifax-Yarmouth. 1559 Brunswick St. Halifax, NS, B3J 2G1

mlunn@halifaxyarmouth.org

902-429-9800 ext 309

And a copy to your Financial Advisor