

Diocese Of St. Catharines  
*Where faith Lives*

**Gift of Stock/Mutual Funds Transfer Form**

**Donor(s) Information**

Name(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_  
Postal Code: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Share/Unit Information**

Please accept this form as authorization to transfer:  
\_\_\_\_\_ of \_\_\_\_\_  
(Number of Shares/Units) (Name of Stock or Mutual Fund and/or Code)  
\_\_\_\_\_ of \_\_\_\_\_  
(Number of Shares/Units) (Name of Stock or Mutual Fund and/or Code)  
as a charitable donation to the Diocese of St. Catharines.  
Parish (optional): \_\_\_\_\_

**For office Use Only**  
Date Received: \_\_\_\_\_  
Price on Receipt: \_\_\_\_\_  
Total Value on Receipt: \_\_\_\_\_  
Date Sold: \_\_\_\_\_  
Price at Sale: \_\_\_\_\_  
Total Value at Sale: \_\_\_\_\_

**Donor's Account Information**

Account Number: \_\_\_\_\_ Account Name: \_\_\_\_\_  
Name of Investment Firm: \_\_\_\_\_  
Firm Address: \_\_\_\_\_  
City: \_\_\_\_\_ Prov. \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Investment Advisor: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Transfer the Securities to:**

IPC Securities Corporation Account Number : 4JJZFVA CUID Code: NBCS FINS#: T080 DTC: 5008  
33 Queen St. St. Catharines, Ontario L2R 5G4  
Account Name: The Roman Catholic Episcopal Corporation for the Diocese of St. Catharines, in Canada  
Investment Advisor: Mr. Tom Chiavarini Phone: 905-682-5230 or 1-877-755-5230  
Email: tom.chiavarini@ipcsecurities.com

**Signature**

As the donor of the shares/mutual funds specified above, I understand that the value of this gift of shares/mutual funds is determined by the closing price of the shares/mutual funds on the day that they are received into the account of the Diocese of St. Catharines and that I will receive a charitable donation receipt for that amount. **Signature of Donor:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Donor (if jointly held):** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Instructions**

Email copies of this completed form to: 1) your broker 2) IPC Securities at 905-682-9034 or tom.chiavarini@ipcsecurities.com 3) the Diocese of St. Catharines at 905-684-2185 x206 or jobrien@saintcd.com.