

# SECURITY/MUTUAL FUND LETTER OF DIRECTION

*Thank you for your generous donation. Your gift will help us reach the most vulnerable in our community.  
To donate your securities to The Ottawa Mission please:*

- 1 Complete this transfer form and instruct your broker to transfer your securities directly to The Ottawa Mission's brokerage account.
- 2 Let us know you would like to make a gift before your broker proceeds with the transfer of securities by emailing this form to the following:
  - The Ottawa Mission at [securities@ottawamission.com](mailto:securities@ottawamission.com)
  - Richard Pope at [popeclientservices@cclgroup.com](mailto:popeclientservices@cclgroup.com)
  - Aviso Wealth at [acpsupport@aviso.ca](mailto:acpsupport@aviso.ca)

## SECTION 1: DONOR AND GIFT DETAILS

### DONOR INFORMATION

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### DONOR BROKER INFORMATION (DELIVERY BROKER)

Name/Institution: \_\_\_\_\_  
Broker Name: \_\_\_\_\_ Account No: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### SECURITIES TRANSFER INFORMATION

Name of Security: \_\_\_\_\_ CUSIP #: \_\_\_\_\_  
Number of Shares/Units: \_\_\_\_\_ Date of Transfer: \_\_\_\_\_  
Gift Details: ☐ Please designate my gift to the area of greatest need  
☐ Other: \_\_\_\_\_  
Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## SECTION 2: TRANSFER DETAILS FOR BROKER

### RECEIVING INSTITUTION INFORMATION

Credential Qtrade Securities Inc., 700 – 1111 West Georgia Street, Vancouver, BC V6E 4T6

**Canadian Securities**  
FINS: T088 | CUID CRED  
Account # 537800A1

**U.S. Securities**  
DTC # 5083  
Account # 537800B1

**Mutual Funds**  
Dealer code: 7799

**Important information about your income tax receipt:** The value of your tax receipt is based on the closing price of the security on the day the securities are received by The Ottawa Mission's custodian.

**Charitable Registration Number:** 108150509 RR0001

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