

# 2025 GIFT OF PUBLICLY TRADED SECURITIES

ALSO FOR SECURITIES INCLUDING BONDS AND MUTUAL FUNDS

Thank you for your generous donation. Your gift will help us reach the most vulnerable children and families who need it most. To donate your gift of stocks to World Vision Canada, please:

1. Let us know you would like to make a gift at least 24 hours before your broker proceeds with the transfer of securities by emailing this form to Planned Giving at securities@worldvision.ca or call us at 1-800-714-3280 if you have any questions.
2. Complete this transfer form and instruct your broker to transfer your securities directly to World Vision brokerage account.
3. Do you manage a self-directed investment account and do not have a broker? If so, please confirm by checking this box to initiate your transfer

## SECTION 1: DONOR AND GIFT DETAILS

### Donor Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Business Name \_\_\_\_\_

Mailing Address \_\_\_\_\_ Email \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_ Phone \_\_\_\_\_

World Vision ID \_\_\_\_\_ World Vision Contact \_\_\_\_\_

### Gift Designation

Where Most Needed  Specific Designation \_\_\_\_\_

### Broker/Delivering Custodian Information

Broker Name \_\_\_\_\_ Firm \_\_\_\_\_ CUID or DTC ID \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_ Client Account Number \_\_\_\_\_

### Description of Securities – Equities/Mutual Funds/Bonds

Security Description \_\_\_\_\_ Quantity \_\_\_\_\_

Security Description \_\_\_\_\_ Quantity \_\_\_\_\_

Security Description \_\_\_\_\_ Quantity \_\_\_\_\_

### Donor Authorization

Signature \_\_\_\_\_ Date (Day/Month/Year) \_\_\_\_\_

## SECTION 2: TRANSFER DETAILS FOR BROKER

Please fax a copy of this form to **Michael Partipilo** at **905-501-8231**

TD Waterhouse Investment Advice, 25 Watline Ave, 6<sup>th</sup> Floor, Mississauga ON L4Z 2Z1

Contact: Biljana Hin, Email: [biljana.hin@td.com](mailto:biljana.hin@td.com)

Account: 8W6484A (CAD) / 8W6484B (USD) Dealer/Rep #: 9834/X6AT CUID: GIST FIN#: T007 DTC: 5036

*Please be advised that the value of the donation will be based on the closing price of the security, on the day the securities are received by the World Vision's broker in accordance with our Board Policy and Revenue Canada Regulations. World Vision Canada's Charitable Registration Number: 11930 4855 RR 0001*