

Donation Instructions

Thank you for considering a gift of securities to the Friends of the North Vancouver Museum and Archives Society.

3 STEPS TO MAKING YOUR DONATION

Step 1 - Prior to initiating your gift of securities, please contact the Friends Society's Donor Services department at 604-990-3700 to determine if we can accept the securities.*

Step 2 - Have your financial advisor complete the attached *Authorization and Direction Form* for your signature. Once completed, **send a scanned copy of the form to the Friends Society at nvmac@dnv.org**.

Step 3 - Have your financial advisor INITIATE the transfer of securities. Because the transfer is a charitable donation, Friends Society's investment broker cannot initiate the transaction.

Valuation and Sale of Securities

The Friends of the North Vancouver Museum and Archives Society (Friends Society) will issue a donation receipt to you for the value of the securities based on the value received into the Friends Society's brokerage account, as of the day received. All securities will be sold immediately upon receipt and the proceeds deposited into the bank account, in accordance with our Board Policy and Canada Revenue Agency regulations. Please note that the market will, in all likelihood, have moved either up or down between the time you give the instructions to transfer and the time we receive the securities.

Once the securities and completed *Authorization and Direction Form* are received by the Friends Society, the securities will be sold as soon as possible and the proceeds deposited into the identified fund.

Timing

Please be aware that it is logistically very difficult, if not impossible, to transfer securities in the last weeks of December. As well, certain securities such as mutual funds can take several months or more to transfer, depending on the complexity of the gift. Avoid this risk by planning your gift well in advance.

Further Information

If you have any questions or require further information about making your gift, please contact our Donor Services department at 604-990-3700. Thank you again for your support of the Friends Society!

*Gifts of securities are subject to review by the Friends Society and the North Vancouver Museum and Archives prior to acceptance and sale.

Let's build a new Museum of North Vancouver
as extraordinary as the community it will serve.

AUTHORIZATION AND DIRECTION FORM

Please note: Your financial advisor MUST INITIATE the transfer of securities and forward a scanned copy of this completed form to nvmac@dnv.org.

Date: _____

This form authorizes the transfer of the following securities currently owned by me/us from my/our account # _____ to Friends Society account # _____ Credential Securities. I/We further authorize the delivering institution to discuss the details of this transfer with Credential Securities, in order to facilitate this request.

Type of securities* (Please check) CDN Stock US Stock Mutual Fund

Number of securities: _____

Ticker symbol (if applicable): _____

Name of security: _____

Name of your financial advisor: _____

Name of financial advisor's company: _____

Financial advisor's contact info: Tel: _____ Email: _____

Gift to be anonymous? Yes No

(In order to properly recognize all donors for their contribution, the Friends Society will share your name, donation amount and contact details with the fund holder unless you have checked "Yes" to the anonymous box above.)

It is my/our understanding that the tax receipt will be will issued based on the value received into the Friends Society's brokerage account, as of the day received.

It is also my/our understanding that the above securities will be offered for sale as described in the Friends Society's guidelines and the net sale proceeds will be credited to the following fund at

Friends of NVMA Society: _____
(Fund name)

Donor's name Signature

Donor's address Email

Donor's name Signature

Donor's address Email