



Instructions for the Donor:

Thank you for choosing to donate to the Central Okanagan Foundation.

Please complete all of the information below in order to ensure a timely transfer. In order for us to receive your gift of securities and issue the appropriate charitable tax receipt(s), please follow the instructions completely.

IF YOU HOLD THE SHARES IN AN ACCOUNT AT A FINANCIAL INSTITUTION:

1. Complete this form to authorize the transfer of securities from your investment account to our donor advised fund account with CIBC Wood Gundy.
2. Send the completed form to your broker, investment advisor or financial institution where your securities are currently held.
3. Please copy the Central Okanagan Foundation by email or fax so that we are aware to expect the transfer and follow through with both institutions. This will alleviate any potential delays. (For year end transfers please note that these take extra time and we encourage this to be done prior to December 10th each year)
4. 4. Send a fax or email copy of the completed form to:
CIBC Wood Gundy
1007-1708 Dolphin Avenue
Kelowna, BC V1Y 9S4
Attention: Ida Kastak
• Fax: 250-762-2629 • Email: Ida.kastak@cibc.ca
If you have any questions please contact: Ida at (250) 717-2618

Additionally, please Fax/ Email a copy of this form to the Central Okanagan Foundation
accounting@centralokanaganfoundation.org

Thank You

Central Okanagan Foundation
#306 – 1726 Dolphin Avenue, Kelowna, BC V1Y 9R9
Phone: (250) 860-6160 Local #106



empowering generations to give.

Delivering Institution Information:

Delivering Institution Name: _____

Account Name at Delivering Institution: _____

Account Number at Delivering Institution: _____

Delivering Institution CUID or DTC: _____

Contact Name: Phone Number: _____

Please accept this form as your authorization to transfer the following securities to:

CENTRAL OKANAGAN FOUNDATION
C/O CIBC Wood Gundy Account No. 825-07619
FINS-T079, CUID – WGDB, DTC - 5030, EUROCLEAR-10034
FEWIRE: BK of NYC/WGI, ABA #021000018
DEALER: 9280

CIBC Wood Gundy
1007-1708 Dolphin Avenue
Kelowna, BC V1Y 9S4
Attention: Ida Kastak
Phone: 250-717-2618 • Fax: 250-762-2629

IMPORTANT

Additionally, please Email a copy of
this form to the Central Okanagan
Foundation at
accounting@centralokanaganfoundation.org
Thank-you

1. Security to be donated – Name _____
CUSIP / Symbol _____ Number of Shares / Units _____

2. Security to be donated – Name _____
CUSIP / Symbol _____ Number of Shares / Units _____

Please contact CIBC Wood Gundy to Confirm the delivery Instructions.

If applicable, please accept these instructions to switch the funds to an acceptable equivalent series code that the receiving institution can hold.

Donor(s) Signature:

1) _____ 2) _____ Date: _____

Donor Name (For receipting purposes) _____

Donor Address _____ Postal Code _____

Contact Info: Email _____ Phone: _____