



Gifts of Stocks and Securities*

Gifts of Publicly Traded Securities and Mutual Funds

Brokerage Accounts

The easiest and safest method of transfer exists if your shares are in a brokerage account. Shares may be transferred by instructions from you, the donor, to your broker to transfer the shares directly from your brokerage account into Crossroads International's brokerage account.

Share Certificates

If you own share certificates, you may donate an endorsed certificate with your signature guaranteed by the bank or your broker, or an unendorsed certificate and a signed stock or bond power of attorney with the signature guaranteed. Certificates may be delivered by courier to Crossroads International if due precaution is observed, that is, the unendorsed certificates and the stock or bond power of attorney are delivered separately.

Re-registering the share certificates in the name of Crossroads International is not recommended, as re-registration can take more than two weeks in which time the value of the shares can change.

Transferring Mutual Funds

To transfer mutual fund shares, the donor must send a letter of instruction to the fund company (e.g. AGF or McKenzie Financial, etc). You, the donor, must sign documents provided by the fund company. A letter of instruction states: "I request that (Name of Mutual Fund) immediately transfer (number) _____ shares from my account # _____ into the name of Crossroads International. Do not sell or redeem this donation from my account. After Crossroads International receives confirmation that the shares are in its account, it may authorize the sale of the shares to use to further its mission."

Crossroads International is pleased to provide you with a **Securities Donation Intent Form** to complete the transaction.

Charitable registration number:

12981 4570 RR0001

**Crossroads International Gift of Securities donation form should accompany your letter of instruction to your financial institution.*