



# Gift of Securities or Mutual Funds Transfer

Please accept this Letter of Direction to transfer “in kind” the following securities (stock shares or mutual fund units) from my brokerage account at:

<b>Brokerage Company Name:</b>		
<b>Advisors Name:</b>		
<b>Account Number:</b>		
<b>Legal Name on Account:</b>		
<b>Number of Shares/Units</b>	<b>Symbol/Name of Security/Mutual Fund</b>	<b>CUSIP# (if known)</b>

**To: International Teams of Canada**

CIBC Wood Gundy Account No. 500-00613 (Canadian dollar), CUID: WGDB - FINS: T079  
305 King Street West, Suite 1010, Kitchener, ON, N2G 1B9, Phone: 519.570.5625

This gift should be applied to the following as designated as follows:

<b>Program, Project, Event, Team or People Designation</b>	<b>Amount or % of Final Value</b>

I understand the “gift-in-kind” tax receipt from ITCA will be based on the closing price the day they are received in the ITCA account at CIBC Wood Gundy. No fees will be levied against the value of these securities to process the transfer. Neither International Teams nor CIBC Wood Gundy will be held responsible for any fluctuation in security values between transfer and liquidation date. Note: Mutual Fund transfers take up to 8 weeks depending on the company.

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Name of Account Holder Date

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Name of Account Holder Date

# Gift of Securities or Mutual Funds Transfer Instructions

**Note to transferring broker or donor:** All questions may be directed to Director of Development at 519.669.8844 (233). Please fax a copy of this completed form (or equivalent) to International Teams Canada, fax number: 519.669.5644

International Teams Canada maintains an account with CIBC Wood Gundy, to receive gifts of securities or mutual funds. IT donors wishing to contribute this way should notify the Development Department of their intention to make a gift of stock to International Teams Canada by emailing [give@iteams.org](mailto:give@iteams.org), or by calling 519.669.8844. Please direct your inquiries to:

- **Brian Carney**, Director of Development *OR*
- **Janelle Weber**, Donor Services Coordinator

Your advisor can easily transfer stocks in “in kind” to International Teams Canada by completing Gift of Securities Transfer Processing Form (see previous page) on your behalf. This is a simple letter of direction and any of Canada’s major brokerage firms transfer shares this way on a daily basis. It’s easy and generally very fast.

The value of your contribution to ITCA and the amount that will be reflected in your charitable tax receipt is based on the closing price on the day your shares or mutual fund units are received and posted to International Teams Canada’s CIBC Wood Gundy account. There are no fees levied against your gift – ITCA pays a flat 1.5% commission to process the sale of the shares with CIBC Wood Gundy.

Please note: Unlike publicly traded stocks that may be exchanged almost instantaneously between two legal entities, transferring ownership of a mutual fund remains a slow process. The re-registration time varies from fund to fund and can take as long as 6-8 weeks.

## Summary of Steps

- **Step One** – Contact International Teams Canada
- **Step Two** – Bring above form to your advisor to process
- **Step Three** – Your advisor processes transfer – you advise ITCA
- **Step Four** – ITCA advises you of day, price and value of stock when received at CIBC Wood Gundy and we direct funds as designated.