

GIFT OF SECURITIES

CCMBC Legacy Fund is pleased to facilitate gifts of securities to Mennonite Brethren ministries. While we do not charge a fee for this service, a small brokerage commission charged by the executing broker is deducted from the proceeds realized on the sale of the securities. This commission does not affect the value of the charitable donation receipt issued to the donor.

Steps in the gifting process:

1. To make a donation of publicly traded securities, the donor must complete the Charitable Donation of Publicly Traded Securities Form and forward it to their broker or financial advisor to initiate the transfer to our brokerage account. The donor should also email a copy of the completed form to our office, as our broker does not receive information identifying the donor or the intended recipient charity.
2. Upon receiving confirmation from our broker that the securities have been transferred into our brokerage account, and upon receipt of a copy of the completed donation form from the donor, we will instruct our broker to sell the securities. Please note that donations received on January 2nd cannot be receipted for the previous calendar year. As the transfer can take some time, donors should be aware of this and initiate the transaction early enough to ensure the donation is in our account by December 31st if receipting is a concern.
3. The securities are sold promptly upon receipt, without consultation with the designated recipient charity, and the proceeds are subsequently disbursed.
4. Once the securities have been sold and the funds received from our broker, we remit the net proceeds to the charity designated by the donor.

Charitable Donation Receipts

CCMBC Legacy Fund Inc. acts as the facilitator and administrator of the securities transfer process. Accordingly, CCMBC Legacy Fund Inc. will issue the charitable donation receipt to the donor.

Note: The donor's charitable donation receipt will generally reflect the fair market value of the securities on the date they are received in the brokerage account of the designated recipient charity, in accordance with the charity's receipting policies and applicable Canada Revenue Agency requirements.

INVESTING IN KINGDOM GROWTH TOGETHER

Charitable Donation of Publicly Traded Securities for Distribution to a Designated Registered Charity

For distribution to the following Mennonite Brethren Registered Canadian Charity:

Name of Charity: _____

Charity Registration No.: _____

1. Donor Information

Name _____

Address _____

City _____ Prov. _____ Postal Code _____

Phone No. _____ Email _____

2. Broker Information

Name of Brokerage _____

Name of Broker/Contact Person _____

Phone No. _____ Email _____

Fax No. _____ Client Account No. _____

3. Securities to be Donated

Name of Security _____

Approximate Value _____ Symbol _____

Number of Shares _____ CUSIP No. _____

4. Brokerage Account Information for CCMBC Legacy Fund Inc.

Brokerage Account of CCMBC Legacy Fund Inc.

BMO Nesbitt Burns
Account No.: 55039953-17
CUID: NTDT

I hereby give authority to deliver free the above-named securities to BMO Nesbitt Burns for credit to the CCMBC Legacy Fund Inc. account, to be distributed to my chosen charity as named above.

Donor signature

Date

Additional comments or instructions:

Instructions for Donor

1) **Complete this form.**

The information requested is necessary to facilitate the transfer, support any required follow-up, and the issuance of receipts.

2) **Send this form to your broker.**

Your broker will make the necessary arrangements for the transfer and will initiate the donation.

CCMBC Legacy Fund cannot initiate the transfer.

3) **Send a copy of this form to CCMBC Legacy Fund (or ask your broker to do so).** Please

send the completed form by email to:
accountingservices@mbchurches.ca

CCMBC Legacy Fund Inc.

1310 Taylor Ave.
Winnipeg MB R3M 3Z6
Telephone: 1-888-669-6575
Email: accountingservices@mbchurches.ca
Fax: 1-204-654-1865

Your support is invaluable to us and we thank you for your support and participation in the ministry of the Canadian Conference!