

IG Wealth Management Mutual Funds

Transfer in Kind to the Alberta Cancer Foundation



Transfer Form for IG Wealth Management Mutual Funds only.

To transfer any other other securities and mutual funds, please see the Alberta Cancer Foundation standard securities transfer form at albertacancer.ca/donate/donate-securities

Thank you for making a gift to the Alberta Cancer Foundation by transferring your IG Wealth Management Mutual Funds fund in-kind. You are making an impact for Albertans facing cancer and doing so in the most tax efficient way possible.

Following these three steps will help you quickly and easily donate your IG Mutual Fund to the Alberta Cancer Foundation.

Step 1: Complete this form

This information is needed for the transfer, tracking and receipting.

Step 2: Give completed form to your broker.

Your broker will arrange for the transfer of securities to the Alberta Cancer Foundation investment account. Alberta Cancer Foundation cannot initiate the transfer. If you do not have a broker, fax/email this form directly to your investment firm.

Step 3: Send Copy

Send a copy of the form (all 3 pages) to the securities team at the Alberta Cancer Foundation: securities@albertacancer.ca

This will ensure a donation receipt is issued for your gift.

Transfer Securities in Kind to

Receiving Institution:

RBC PH&N Investment Counsel
c/o RBC Dominion Securities Inc.,
180 Wellington Street West 10th Floor
Account Transfer Department
Toronto, Ontario M5J 0C2
Fax: 416-313-7493

Dealer Number: 9190

Rep Number: 1JS

Contact Name: Arren Roldan

Contact Phone Email:
gibbs.associates@rbc.com

Account Name:

Alberta Cancer Foundation

Account Number:

46359128-11

CUID: DOMA

DTC: 5002

EUROCLEAR # 90065

A charitable tax receipt from Alberta Cancer Foundation, will be based on the closing price of the securities on the day the securities are received in Alberta Cancer Foundation's brokerage account. **In order to receive a charitable tax receipt for the calendar year, the securities must be transferred to the Alberta Cancer Foundation account no later than December 15th, of the same calendar year.** These securities have been transferred to the Alberta Cancer Foundation without restriction.

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Letter of Authorization from Donor to Broker.

Donor Information

Name of Donor(s)

Address

City

Province

Postal Code

Daytime Phone

Email

Foundation Contact (if applicable)

Date

Broker / Brokerage Account Information

Delivering Institution

Contact Name

Contact Phone Number

Contact Email

Use of Funds (please check one)

☐ I would like my gift to be designated where the need is greatest

☐ I would like to direct my gift to: _____

Publicly Traded Securities to be Transferred in Kind

Security Description	Fund ID	Quantity	Approx. Value (\$)
Security Description	Fund ID	Quantity	Approx. Value (\$)
Security Description	Fund ID	Quantity	Approx. Value (\$)

Additional comments/instructions/Information

I have read and understand the above information and authorize the transfer of the above mentioned assets to the Alberta Cancer Foundation. I also agree that the Alberta Cancer Foundation or its agent, may contact my broker for the purpose of concluding this transaction.

Donor Signature

Date

Donor Signature

Date

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Completed by Alberta Cander Foundation Staff

Step 1:

Alberta Cancer Foundation authorizes RBC PH&N Investment Counsel to sell all securities immediately upon arrival.

Step 2:

Alberta Cancer Foundation authorizes RBC PH&N Investment Counsel to transfer the proceeds of sold securities to the Alberta Cancer Foundation bank account on file at RBC.

Name

Name

Title

Title

Signature

Signature

Date

Date