

# Letter of Direction for a gift of publicly traded securities to Charitable Impact Foundation



## 01 Donor information

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Donor name	Phone	
<input type="text"/>	<input type="text"/>	
Address	Alternative phone	
<input type="text"/>	<input type="text"/>	
City	Province	Postal code
<input type="text"/>		
Email	<input type="text"/>	

## 02 Broker Information

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Name of brokerage firm	Phone	
<input type="text"/>	<input type="text"/>	
Brokerage or contact name	Email	
<input type="text"/>	<input type="text"/>	
Broker address	CUID	DTC#
<input type="text"/>	<input type="text"/>	<input type="text"/>
City	Province	Postal code
<input type="text"/>		
Relinquishing account number		
<input type="text"/>		

# 03 Authorization to transfer securities

It is my wish that Charitable Impact Foundation will place the proceeds from selling the following securities (collectively, the “Securities”) into my Impact Account. However, I hereby irrevocably and unconditionally authorize and direct the transfer of securities as a charitable donation to CHIMP: Charitable Impact Foundation without any condition or restriction whatsoever.

Name of security	Trading symbol/CUSIP #	Number of shares
1 _____	1 _____	1 _____
2 _____	2 _____	2 _____
3 _____	3 _____	3 _____

### Transfer securities to:

CG Wealth Management

**DEALER 9335 • REP CODE VR2S •  
CUID CCAM • DTC# 5046 •**

For credit to CHIMP: Charitable Impact Foundation (Canada)  
Account: #20J-B26A-0  
Contact: Stenner Wealth Partners+ | SWPAdmin@CGF.com

### Send signed Letter of Direction to:

1. Your broker
2. Stenner Wealth Partners+  
SWPAdmin@CGF.com
3. Charitable Impact  
advisors@charitableimpact.com

Signature of donor

Date (mm/dd/yyyy)

**CHIMP: Charitable Impact  
Foundation (Canada)**

A Canadian registered charity: 84552 8827 RR0001

1250 — 1500 West Georgia St. Vancouver, BC, V6G 2Z6  
charitableimpact.com  
strategies@charitableimpact.com

