

Letter of Direction



Complete this form when donating cash or publicly traded securities directly into a Charitable Investment Account for CHIMP: Charitable Impact Foundation (Canada), a Canadian registered charity (84552 8827 RR0001).

01 Donor information (for tax reporting purposes)

Select 1: **Personal** **Personal - Joint** **Corporate**

Donor Name(s)

Address

City

Province

Postal Code

Email Address

Phone Number

02 Description of Assets

Cash

\$

CAD

USD

Cash	CAD	USD
Security Name _____ Symbol _____ Quantity _____ CAN/US _____	Security Name _____ Symbol _____ Quantity _____ CAN/US _____	Security Name _____ Symbol _____ Quantity _____ CAN/US _____

OR: **List Attached**

Estimated Total Value
of Donation in CAD

\$



03 Delivering Account Information

Account Name	Account #	Name of Brokerage Firm		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
FINS #	CUID #	DTC #	Dealer #	Rep Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Name	Contact Email	Contact Phone Number		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

04 Receiving Account Information

Account Name	Account #	Name of Brokerage Firm		
CHIMP: Charitable Impact Foundation (Canada)	<input type="text"/>	<input type="text"/>		
FINS #	CUID #	DTC #	Dealer #	Rep Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Name	Contact Email	Contact Phone Number		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

05 Agreement and Signature

I hereby irrevocably and unconditionally authorize the donation of assets identified in this Letter of Direction as a charitable donation to CHIMP: Charitable Impact Foundation (Canada), without any condition or restriction whatsoever.

Signature	Date
<input type="text"/>	<input type="text"/>
Signature	Date
<input type="text"/>	<input type="text"/>

06 Next Steps

1. Send a copy of this form to your Wealth Management Team to initiate this charitable donation.
2. Send a copy of this completed form to Charitable Impact at advisors@charitableimpact.com
3. Set up an Impact Account if you don't have one already. You can do so by visiting my.charitableimpact.com/users/new and follow the prompts.

Good to know

The tax receipt amount for publicly traded securities is based on the security's closing price on the date the assets are received in the Charitable Investment Account. If the securities are in US dollars, Charitable Impact uses the Bank of Canada's closing exchange rate to value the shares in Canadian dollars.