



110 Doon Road | Kitchener | ON | N2G 3C8
T 519.743.5209 | www.rockway.ca
Charitable #: 119122091RR0001

IN-KIND DONATION FORM - SECURITIES

REQUIREMENTS FOR TAX RECEIPT PURPOSES:

- Gifts of publicly traded securities are considered in-kind gifts.
- All in-kind donations must be approved by Rockway's Director of Finance prior to acceptance of the donation.
- Gifts of Publicly Traded Securities will only be accepted if they are readily marketable and can be liquidated.
- CRA has allowed that the fair market value of securities donated is based on the closing price of the units or shares recorded on the day the securities are received into Rockway's brokerage account.

SECURITIES INFORMATION:

NAME OF SHARES: _____

DESCRIPTION OF SECURITIES: _____

NUMBER OF SHARES: _____ APPROXIMATE VALUE: \$ _____

ACCOUNTHOLDER NAME(S): _____

DONATION DESIGNATION:

Please indicate how you would like your donation designated:

- Lead Us Onward* – where most helpful
- Other: _____

DONOR INFORMATION:

DONOR NAME(S): _____

ADDRESS: _____ CITY: _____

POSTAL CODE: _____ PHONE: (_____) - _____ E-MAIL: _____

DONOR SIGNATURE(S): _____ DATE: _____

FORWARD THIS FORM TO ROCKWAY:

Karen Martin Schiedel, Director of Finance and HR
E-mail: karenms@rockway.ca Phone: 519-342-0007 ext. 3010

FORWARD CHARITABLE DONATION OF SECURITIES IN-KIND FORM TO:

National Bank Independent Network (NBIN) via fax – 416-542-2354
AND
The Rae Lipskie Partnership via email – olivia@raelipskie.com

INSTRUCT YOUR BROKER TO INITIATE THE TRANSFER TO ROCKWAY'S ACCOUNT WITH NBIN.

~ ~ ~ **Thank You for your Donation** ~ ~ ~

FOR OFFICE USE ONLY

Accepted on behalf of Rockway: _____ (authorization) Date: