

## INSTRUCTIONS

1. If the year on this form is not the current year then please contact [fay@ljf.on.ca](mailto:fay@ljf.on.ca) or [stephen.taran@gmail.com](mailto:stephen.taran@gmail.com) for an updated form. The year is marked at the top of the form – see: **YEAR DONATION AUTHORIZATION**
2. Your broker, or the back-office of your discount brokerage, is the one who initiates the transfer process. As such, this form (or a version provided by your financial institution) must be submitted to them. It is critical that you also send a copy to the LJCF (see #3 below), even though our brokerage (currently ScotiaiTrade) does not start the process.
3. The LJCF is not automatically notified of incoming donations of securities in-kind. As such, even if you have submitted a form provided by your financial institution, it is crucial that you send a copy of **this** form to both:
  - i. Stephen Taran at [stephen.taran@gmail.com](mailto:stephen.taran@gmail.com) or by fax to 519-231-0279; and
  - ii. Fay Edwards at [fay@ljf.on.ca](mailto:fay@ljf.on.ca) or by fax to 519-673-1161

on the same day that you submit it to your broker. The transfer process normally takes 1 – 5 business days.

If you do not email this form to:

- b. Stephen Taran then he will not know to monitor the LJCF's iTrade account and sell your donated shares in a timely manner. In such circumstances, the value of your donated shares will continue to fluctuate with the market; this could result in substantially less funds being sent by the LJCF to your designated charity; and
  - c. Fay Edwards then she will not know to whom should be issued a charitable donation receipt. Furthermore, the LJCF will not know which charity is designated to receive the proceeds when your donated shares are sold.
4. Please select one or more of the following local Jewish charities when directing the LJCF to transfer funds from the sale proceeds of your donation-in-kind:
- Canadian Magen David Adom for Israel
  - Chabad at Western
  - Congregation Beth Tefilah
  - Congregation Or Shalom at London, Ontario
  - Gan-Gani Nursery School of London
  - Hadassah-Wizo Organization of Canada
  - Hillel Ontario
  - Jewish National Fund of Canada
  - London Community Hebrew Day School
  - London Jewish Community Centre
  - Temple Israel (of London)
  - The London Jewish Community Foundation
  - United Jewish Appeal

We hope we didn't miss any local Jewish charities, but if you would like to donate to another local Jewish charity not listed above, then please contact us after making sure that it is a registered charity by searching CRA's Charities Listings directory (<https://apps.cra-arc.gc.ca/ebci/haip/srch/advancedsearch-eng.action>).

If you would like to donate to these and other Jewish **and/or** non-Jewish charities using donations-in-kind, then you will need to establish a donor-advised fund with the LJCF. For more information, please contact Stephen Taran at 519-432-8626 ext. 2 or at [stephen.taran@gmail.com](mailto:stephen.taran@gmail.com)



2024 DONATION AUTHORIZATION

ELECTRONIC TRANSFER OF SECURITIES

Please read the Instructions on page two before completing this form and then fax or email it to:

1. Your own broker, who needs to initiate the transfer process; and
2. The London Jewish Community Foundation (the "LJCF") Attn: Fay Edwards 519-673-1161 or by email to [fay@ljf.on.ca](mailto:fay@ljf.on.ca) and to [stephen.taran@gmail.com](mailto:stephen.taran@gmail.com)

Donate \_\_\_\_\_ shares of \_\_\_\_\_ to the LJCF.  
*Number Name of Security*

Name of Donor: \_\_\_\_\_

Address: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Advisors Telephone #: \_\_\_\_\_

Firm: \_\_\_\_\_

Account Number: \_\_\_\_\_

Name of Security: \_\_\_\_\_

# of Units Transferred: \_\_\_\_\_

Estimated Total Value of Donation: \_\_\_\_\_

Date of transfer to Foundation Account: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Name of Account: The London Jewish Community Foundation**

**Account #: 558-42792-1-9**

**CUID#: SCOT**

**DTC#: 5011**

**Dealer Code: 9155**

**FINS#: T085**

**CLEAR STREAM#: 52065**

**REG NO. 888005840RR001**

I direct The London Jewish Community Foundation to:

credit the full amount of my donation to my donor-advised fund held at the foundation; or

transfer the full amount of my donation to: \_\_\_\_\_; or

transfer \_\_\_\_\_ (list one or more amounts and charities) and the balance of the proceeds to \_\_\_\_\_ (insert that name of the final charity).

Signature(s): \_\_\_\_\_

I confirm that I have sent form to:  my broker and to both  Stephen Taran and  Fay Edwards.