

Donating securities to the Pembina Institute

Transferring publicly-traded securities (stocks, bonds, mutual funds) is simple, and may result in significant tax savings for you.

1. DONOR INFORMATION

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Email: _____ Phone: _____

2. FINANCIAL INSTITUTION INFORMATION

Institution Name: _____

Broker Name: _____

City: _____

Province: _____ Postal Code: _____

Email: _____ Phone: _____

3. SECURITIES TO BE TRANSFERRED

Name & Symbol: _____ # of Shares: _____

Name & Symbol: _____ # of Shares: _____

4. TRANSFER SECURITIES IN KIND TO

Pembina Institute for Appropriate Development

RBC Direct Investing Inc.,

Banker's Hall 195 – 315 8th Ave SW, Calgary AB T2P 4K1

Account #: 66850903 1-5

CUID: DOMA

DTC: 5002

Please accept this letter as authorization to proceed with the above-noted “in-kind” security donation to the Pembina Institute For Appropriate Development.

Signature: _____ Date: _____

PEMBINA
Institute

Canadian charitable number:
87578 7913 RR 0001

www.pembina.org

INSTRUCTIONS

1. Complete this form.

This information is needed so your donation can be transferred and we can send you a receipt.

2. Give the form to your broker.

Your broker will arrange for the transfer of shares to the Pembina Institute's investment account. Neither the Pembina Institute nor our broker can initiate the transfer. If you do not have a broker, send this form directly to your investment firm.

3. Send a copy of the form

to the Pembina Institute's donations@pembina.org email (or ask your broker to do this), so we may issue a donation receipt for your gift.

For more information, please contact:
The Pembina Institute
403-269-3344
donations@pembina.org

Thank you for supporting the Pembina Institute

#802, 322 – 11 Avenue SW Calgary, AB T2R 0C5 Canada