



320-2285 Clark Drive, Vancouver, BC V5N 3G8  
tel. 604.257.5151 | fax. 604.257.5148

[jfsvancouver.ca](http://jfsvancouver.ca)

## Gift of Securities

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Thank you for your interest in donating securities to Jewish Family Services. Simply follow these directions:

1. Complete the form below with your broker's assistance and inform your broker or financial advisor regarding your gift of securities to Jewish Family Services.
2. Your broker should deliver the form and securities to our agent, **PI Financial**

|                            |  |
|----------------------------|--|
| <b>For account of:</b>     | Jewish Family Services   |
| <b>Account Number:</b>     | 025-1618-5   |
| <b>PI Financial CUID#:</b> | PISV   |
| <b>Contact:</b>            | Harry Fischer, PI Financial Trader Desk  |
| <b>Email:</b>              | <a href="mailto:hfischer@pifinancialcorp.com">hfischer@pifinancialcorp.com</a> |
| <b>Phone:</b>              | 604-664-2749   |
| <b>Fax:</b>                | 604-664-2639   |

3. Please also send a copy of the form to our office: [development@jfsvancouver.ca](mailto:development@jfsvancouver.ca) or 604-257-5148.
4. The securities will be sold and deposited into our bank account. This process may take up to two weeks.
5. JFS will issue a tax receipt to you based on the market closing price on the day they are received in our brokerage account.

Thank you for making a difference in the lives of our many clients! If you have any questions or concerns, please do not hesitate to call:

Chris Chan  
Senior Database Administrator and Associate, Philanthropy  
tel: 604-637-3315  
fax: 604-257-5148  
email: [cchan@jfsvancouver.ca](mailto:cchan@jfsvancouver.ca) [www.jfsvancouver.ca](http://www.jfsvancouver.ca)

Jewish Family Services Charitable Registration #: 107534794RR0001



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## Gift of Securities Transfer Form to Jewish Family Services

Please complete all fields with your broker's assistance.

### Broker details:

Broker Contact Name

Brokerage Name

CUID# (Broker to complete)

Telephone

Email

Client Account Number

### Donor/Client Information:

Name of donor/client for charitable tax receipting purposes

Full Address

Telephone

Email

### Instructions from Donor to Broker

I hereby give authority to deliver free as a charitable gift the following securities to PI Financial to the attention of **Harry Fischer** for credit to account #025-1618-5 in the name of **Jewish Family Services**.

| Number of shares | Name of Securities | Symbol | CUSIP# |
|------------------|--------------------|--------|--------|
|                  |                    |        |        |
|                  |                    |        |        |
|                  |                    |        |        |

Authorization of Donor / Client (signature)

Date authorized

I have emailed a signed copy of this form to hfischer@pifinancialcorp.com or faxed to 604-664-2639.

I have emailed a signed copy of this form to development@jfsvancouver.ca or faxed to 604-257-5148.