



320-2285 Clark Drive, Vancouver, BC V5N 3G9
tel. 604.257.5151 | fax. 604.257.5148

jfsvancouver.ca

Gift of Securities

Thank you for your interest in donating securities to Jewish Family Services. To ensure your gift is processed smoothly, please follow the steps below:

1. Complete the form below with the assistance of your broker, and advise them of your intention to make a securities donation to Jewish Family Services.
2. Have your broker deliver the completed form and the securities to our agent, **Ventum Financial**.
For account of: Jewish Family Services
Account Number: 025-1618-5
CUID#: PISV
Contact: Taylor Ross
Email: taylor.ross@ventumfinancial.com
Phone: 604-718-7599
Fax: 604-664-2666
3. Send a copy of the form to our office: development@jfsvancouver.ca or fax to 604-257-5148.
4. Once received, the securities will be sold and the proceeds 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 the securities 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 feel free to contact us:

Chris Chan

Senior Database Administrator and Associate, Philanthropy

Tel: 604-637-3315

Fax: 604-257-5148

Email: cchan@jfsvancouver.ca

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Charitable Registration #: 107534794RR0001

Updated December 25





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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

Phone

Email

Comment

Instructions from Donor to Broker

I hereby give authority to deliver free as a charitable gift the following securities to Ventum Financial to the attention of **Taylor Ross** 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 taylor.ross@ventumfinancial.com or faxed to 604-664-2666.

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

Updated December 25

