



# Letter of Direction

**Please follow these steps to transfer your shares or mutual fund units to the Okanagan College Foundation in electronic form.**

- 1) **Please complete this form with your broker and request him/her to use the form to initiate the transfer.** If you do not have a broker, please complete the form and fax it directly to your delivering institution.
- 2) a) **Copy this form by email to Clayton Gall, RBC Phillips Hager & North Investment Counsel**  
[clayton.gall@rbc.com](mailto:clayton.gall@rbc.com) (Phone: 250-469-7401)
- b) **Copy the form by email to Okanagan College Foundation**  
[foundation@okanagan.bc.ca](mailto:foundation@okanagan.bc.ca) (Phone: 250-862-5630)

I, \_\_\_\_\_ am hereby donating / gifting \_\_\_\_\_ shares of  
(Name of Donor) (Number of Shares)

\_\_\_\_\_ from Financial Institution \_\_\_\_\_  
(Name of Shares) (Name of Institution)

\_\_\_\_\_ A/C \_\_\_\_\_ to the Okanagan College Foundation.  
(Account Number)

Please send the shares to **RBC Phillips, Hager & North Investment Counsel Inc. A/C 4631130111**.  
 Receiving institution information: RBC Dominion Securities Inc.  
 Account Transfer Department  
 180 Wellington Street West, 12<sup>th</sup> Floor  
 Toronto, ON M5J 0C2  
 Phone: 416-313-8973 / Fax: 416-313-7493  
 CUID: DOMA / DTC: 5002 / Euroclear: 90065 / Dealer number: 9190

To be directed to \_\_\_\_\_  
(Name of Fund/Program/Faculty)

I understand that the Okanagan College Foundation will provide me with a charitable receipt based on the Fair Market Value (FMV) of the shares on the date the shares are transferred to the Okanagan College Foundation account at RBC Phillips, Hager & North Investment Counsel Inc.; generally the closing value on the date of transfer. I also understand that while there may be exceptions, it is Okanagan College Foundation's policy to sell the shares within days of receiving the shares.

\_\_\_\_\_  
(Donor) Signature

\_\_\_\_\_  
(Witness) Signature

\_\_\_\_\_  
(Donor) Print Name

\_\_\_\_\_  
(Witness) Print Name

\_\_\_\_\_  
Donor Address

\_\_\_\_\_  
City, Province, Postal Code

\_\_\_\_\_  
Donor Telephone Number

\_\_\_\_\_  
Okanagan College Foundation Signatory

\_\_\_\_\_  
Donor Email Address

\_\_\_\_\_  
Date