



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 (Phone: 250-469-7401)
- b) Copy the form by email to Okanagan College Foundation
foundation@okanagan.bc.ca (Phone: 250-862-5630)

I, _____ am hereby donating / gifting _____ shares of
 _____ from Financial Institution _____
 _____ A/C _____ to the Okanagan College Foundation.
(Name of Donor) (Number of Shares) (Name of Shares) (Name of Institution) (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, 12th 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

Donor Email Address

Okanagan College Foundation Signatory

Date

Date