

## How to Make a Successful Donation of Publicly Traded Securities (Shares)

Thank you so much for your interest in making a donation to Lighthouse Festival.

Listed below are the steps required to donate a gift of shares/securities. By providing the pertinent information to Lighthouse Festival you will help expedite the transaction effectively to maximize your gift.

1. Donor speaks with their advisors/brokers to confirm the gift is in their best interest.
2. Donor provides the following data to Lighthouse on the attached form:
  - a. personal contact information
  - b. donation of shares information
  - c. broker contact information
  - d. donor authorizes that Lighthouse may contact their broker if required.
3. When ready, the donor advises their broker to initiate the transaction.
4. Lighthouse authorizes their own broker to accept the transfer.
5. The donor's broker will put the shares up for transfer to Lighthouse account at CIBC Wood Gundy.
6. Lighthouse broker will receive the transfer and cash in the shares upon receipt.
7. Lighthouse will notify the donor that the transaction is complete and a charitable tax receipt will be issued immediately. (The receipt is base on the value on the day Lighthouse receives the funds into the brokerage account.)

Note: If the donor does not have a broker, they can contact Lighthouse's broker, Peter Post at CIBC Wood Gundy (Phone: 519- 428-3960 or email: [peter.post@cibc.ca](mailto:peter.post@cibc.ca)) to proceed with the transaction.

Thank you for your interest in supporting Lighthouse Festival.

For further details, please contact:  
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