

I. Introduction

This Gift Form should be used to provide Benefaction Foundation (“Benefaction”) with formal instructions for donations to our organization. Please complete the required information depending on the type of donation being made:

- Donation to your own Donor Advised Fund
- Donation to a third-party’s Fund at Benefaction
- Flow Through Direct donation to charity

II. Donor Details

Title (<i>Mr., Mrs., Miss, Ms., Dr., Corporation</i>)		Full Name (<i>including initials</i>)		
Street Address		City	Province	Postal Code
Telephone Number	Email Address		Business Number (<i>if applicable</i>)	
Residency (<i>if different than mailing address</i>)				

Provide a photocopy of a valid Passport or Driver’s License for signature verification unless the donor is verified by the Investment Advisor *OR* if a business, provide a copy of the Corporate Resolution and Articles of Incorporation and Business Number unless the corporation is verified by the Investment Advisor (*see For Advisor Use Only*).

III. Donation

Prior to transferring cash or securities to our account, please email a completed copy of this form to your Advisor and copy Benefaction at donor_services@benefaction.ca.

Benefaction requires a Letter of Authorization (LOA) confirming the donation in-kind or in cash and/or the completion of the donation details below.

- Letter of Authorization attached
- See details below

Donation of Cash

- I hereby donate the following cash sum to Benefaction Foundation: \$ _____.
- By cheque
- By one-time transfer from my/our investment account

Name of Delivering Institution	Account Name	Account Number
--------------------------------	--------------	----------------

Donation of Securities

- I hereby authorize the transfer of securities from my account to the following account for Benefaction Foundation. I hereby acknowledge that Benefaction uses the closing market price on the date of transfer for tax receipt valuation and that this amount may differ from the proceeds from sale.

Name of Delivering Institution	Account Name (<i>Donor’s Account</i>)	Account Number
Name of Receiving Institution	Account Name Benefaction Foundation	Account Number

Securities in-kind donations may include publicly listed shares, units in a mutual fund or bonds. Indicate if any securities are in certificate form.

Security/Fund Description (Name)	Symbol/CUSIP or Fund Code	Quantity (Shares/Units)	Estimated Value \$
Security/Fund Description (Name)	Symbol/CUSIP or Fund Code	Quantity (Shares/Units)	Estimated Value \$
Security/Fund Description (Name)	Symbol/CUSIP or Fund Code	Quantity (Shares/Units)	Estimated Value \$

- See List attached (*if your list of securities requires more space, please provide on a separate instruction page*)

IV. Direction

Donation to a Benefaction Donor Advised Fund

- I direct this donation to: _____ (the "Fund").
I understand that this gift is governed by the Donor Agreement established between Benefaction Foundation and the Fund, including relevant donation fees.

Flow-Through Direct Donation to Charity

- I direct this donation to the following charities. I understand that Benefaction will receive a fee of 1% on the first \$100,000 and 0.50% on the remainder of the value of this donation. A minimum fee of \$100 for the initial grant and a minimum fee of \$15.00 for each additional grant applies.

Charity Name	CRA Registration #	Gift Amount (% of total)
Charity 1		%
Additional information: Add any special instructions for your grant such as the name of a specific program you would like to fund or a contact person at the charity.		
Charity 2		%
Additional information		
Charity 3		%
Additional information		
Charity 4		%
Additional information		
Charity 5		%
Additional information		
Charity 6		%
Additional information		
TOTAL		100%

- See List attached (if your list of grants requires more space, please provide on a separate instruction page)

V. Privacy

I acknowledge that Benefaction may use my information to process gifts, administer delivery of charitable services, establish, maintain and manage our relationship, including set up and management of the Fund and maintenance of an accurate record of my involvement; provide information regarding the operations of the Fund and offer further opportunities to give; verify my identity and protect against fraud; satisfy regulatory obligations and other legal requirements; and to create statistics about Benefaction's operations and understand the current and future needs and preferences of donors.

I further acknowledge that, in administering its charitable services, Benefaction may provide my personal information to other persons: where the other parties are grant recipients and I have consented below to be recognized; where the other parties are Benefaction's third-party service providers, suppliers or agents who assist Benefaction in providing their services; and where they are required or permitted to do so by law.

The third-party service providers Benefaction engages with are asked to respect their privacy practices and do not use any personal information for purposes other than to carry out their instructions or provide services for them. To find out more about Benefaction's privacy practices, please refer to the Privacy Policy posted at www.benefaction.ca.

All grants made to charities from Benefaction are accompanied by a letter indicating the gifts are made from the donor. These grants may be disbursed with anonymity or with full disclosure of the donor's name and address in the letter. Please indicate your preference. (*Donors to their own personal Benefaction Fund need not complete this information.*)

- I prefer to be anonymous
- I prefer to be identified personally to the recipient charity or Benefaction Fund, including my name and address

VI. Signature

I understand that this **donation represents an irrevocable gift to Benefaction Foundation**, a registered charity, and is not refundable to me for any reason.

Donor name _____ Donor signature _____ Date _____

For Advisor Use Only

Investment Firm	
Advisor Name(s)	Telephone Number
Address	Email Address

Please select the appropriate option below and provide the requested information.

<input type="checkbox"/> I hereby certify that the Donor has provided a photocopy of a valid Passport or Driver's License for signature verification.	Identification Number
<input type="checkbox"/> I hereby certify that the Donor is a business and has provided a photocopy of the Corporate Resolution and Articles of Incorporation and Business Number.	Business Number
<input type="checkbox"/> I hereby certify that the Donor is a client of _____ and that the client is exempt from identity verification, or the client's identity has been verified by alternative means, in accordance with Canada's Proceeds of Crime (Money Laundering) and Terrorist Financing Act (the Act) and Regulations.	

I acknowledge and agree to provide Benefaction with a copy of the documentation used to verify the client's identity, should it be required in an audit or other regulatory investigation and/or request.

Advisor name _____ Advisor signature _____ Date _____

Appendix: Flow-Through Direct Donation Instructions

Charity Name	CRA Registration #	Gift Amount (% of total)
Charity 1		%
Additional information: Add any special instructions for your grant such as the name of a specific program you would like to fund or a contact person at the charity.		
Charity 2		%
Additional information		
Charity 3		%
Additional information		
Charity 4		%
Additional information		
Charity 5		%
Additional information		
Charity 6		%
Additional information		
Charity 7		%
Additional information		
Charity 8		%
Additional information		
Charity 9		%
Additional information		
Charity 10		%
Additional information		
Charity 11		%
Additional information		
Charity 12		%
Additional information		
TOTAL		100%