



## LODGE RENEWAL AT SOVEREIGN LAKE NORDIC CENTRE

# HOW TO DONATE SECURITIES (Stocks & Bonds)

Sovereign Lake Nordic Club (SLNC), a not-for-profit society, is raising funds to upgrade the existing day lodge to meet current and future needs as both a community amenity and as a destination for visitors. BC Parks, our partner in the project, has committed \$1,400,000 to the construction budget. To complete the fundraising, SLNC is seeking the support of private companies, foundations, government agencies, and individual skiers, snowshoers, and friends. One of the ways to give is to donate stocks, bonds, and other securities. This option is being made possible by **Nordiq Canada** with **CanadaHelps**<sup>1</sup>. Here is how to do it.

- **Complete the CanadaHelps online pledge.** In the form you provide details about your securities or mutual funds donation. Once complete, download the Letter of Direction form. You will also receive an email confirming your pledge. CanadaHelps will receive and process your pledge. Access it via <https://www.canadahelps.org/en/dn/103500>
- **Send the completed Letter of Direction** to your broker or advisor authorizing the transfer of your shares to Canada Helps. It typically takes 1 to 2 working days for the transfer to settle within the Canada Helps account.
- **Canada Helps will promptly sell the shares** - Once proceeds are received, CanadaHelps will send you a detailed confirmation email **with your charitable tax receipt** and disburse the proceeds from the sale to SLNC.

If you use a Direct Investing platform such as RBC Direct Invest, TD Waterhouse Direct Investing, Scotia iTrade, or QuestTrade, you may need to complete the Letter of Authorization/Direction Form available from your Direct Investing firm.

The timeline is 5-7 business days for donations of regular securities. Please note this timeline is dependent on each step happening without delay; the donor promptly sending the Letter of Direction to the broker/advisor; and the broker/advisor processing the transfer of the funds. In practice, 7-10 business days may be typical.

Thank you for considering a donation of securities to the project. If you have any questions, please contact Hugh Hamilton at (250) 938-3408 or [lodgefunds@sovereignlake.com](mailto:lodgefunds@sovereignlake.com).

---

<sup>1</sup> CanadaHelps is a registered charity that helps other charities and qualified donors with managing donations.