



How to Make a Gift of Stock to Evergreen

There are two simple steps that need to be taken in order to make a gift of stock:

1. Contact your broker to initiate the sale
2. Contact Amanda Saunders at Evergreen to inform her of your gift

Contacting your Brokerage Firm

Your advisor/broker will require particular information in order to make an electronic transfer of stock from your account to Evergreen's account. The attached form ("Letter of Instruction for Stock Transfer") contains all the information your broker will need. In fact, you can complete this form and forward the information to your broker in order to initiate the transfer.

Contacting Evergreen

In case your broker does not forward this information to Evergreen, it is important to ensure that:

1. Evergreen knows the gift is on its way
2. Evergreen knows how you would like the gift to be used (i.e. Area of Greatest Needs)
3. Evergreen knows who the gift is from and in whose name to issue a tax receipt

Please contact Amanda Saunders (asaunders@evergreen.ca, 416-596-1495 ext. 332 to notify her of your gift.

What Happens Next

Once the stock has been transferred Evergreen's brokerage firm will liquidate the stock and Evergreen will issue you a tax receipt based on the closing value of the shares on the date of transfer.

Benefits of Giving Stock

Thanks to changes made by the Federal Government on May 2nd 2006, any capital gains taxes you would have normally paid on the shares are eliminated.



Letter of Instruction for Stock Transfer
(Information that your brokerage firm will need)

Please transfer _____ shares of _____ stock
to Evergreen's account at **RBC Direct Investing**

Evergreen's Account Number is: **66539384-12**

A tax receipt should be issued as follows:

Name(s) _____

Address _____

Signature _____

Contact Information:

Evergreen

Amanda Saunders, Development Coordinator

Evergreen

550 Bayview Avenue, Suite 300, Toronto, ON M4W 3X8

Phone: 416-596-1495 ext. 332

Fax: 416-596-1443

asaunders@evergreen.ca