

Please Print

Section One – Instructions

Please complete this form to make an Additional Contribution to an existing **Flex Charitable Gift Fund** (“Fund”) with an irrevocable contribution to the **Gift Funds Canada** (“CGFCF”). Please review the Charitable Gift Fund Program Guide (“Program Guide”) for information on asset types that can be contributed. By signing this Agreement, you acknowledge that you have received and reviewed the Program Guide, you understand its terms, it forms part of this Agreement and you intend to contribute to the Fund noted below. Please submit the original version of this form and any other applicable documents, to your Investment Advisor for processing.

If you are working directly with CGFCF and **NOT** through a Financial Advisor, then please send the documents to: Gift Funds Canada, 645 Gardiners Rd., Ste. 202, Kingston, ON K7M 8K2

Fund Information: *(the name of the Fund or the donor and the Fund ID number)*

Check whether this is:

An **Additional Contribution by the original donor(s)** who established the Fund or by the **Fund Successor(s)**.

- \$ 250 - \$ 4,999 *(this will be added to existing investments consistent with Fund Agreement)*
- \$ 5,000 or more *(you may make new investment recommendations. See Section Four)*

A Third-Party Contribution. If the person making the contribution is not a donor named in the agreement that established the Fund, then they are considered a third-party contributor. The minimum donation for this type of gift is \$250. *(Please complete Sections 2 and 3 only.)*

Section Two – Third Party Donor Information

I, the Third-party contributor, understand that any contribution, once accepted by the CGFCF, represents an irrevocable contribution to the above-named Fund and is not refundable to me. By signing this Agreement below, I acknowledge and direct the CGFCF to add my contribution to the Fund identified in this document. I further understand, while I will receive a donation receipt for my contribution, I do **not** obtain any advisory privileges with regard to grants or investments on this CGF. I did not receive anything in exchange for, or in consideration of, this contribution.

Corporation <i>(if applicable)*</i>		
Full Name <i>(including title Mr., Mrs., Ms., Dr., etc)</i>		
Mailing Address		
City	Province	Postal Code
Telephone <i>(Home)</i>	Telephone <i>(Business)</i>	
Fax	Email	
Signature:		

Section Three – Description of Gifted Assets

Donation of Cash

I/We donate the following gift of cash to a Charitable Gift Fund

by cheque

Your Investment Advisor will work with you to fund your contribution with a cheque. OR If you are working directly with CGFCF and not through an Investment Advisor, then make the cheque payable to Charitable Gift Funds Canada Foundation.

by transfer/direct deposit from my account

Your Investment Advisor will work with you to transfer your cash. OR Contact CGFCF to make arrangements, if you are NOT working with an Investment Advisor.

Donation of Securities

I/We donate the following securities* to a Charitable Gift Fund

Security 1 (Name)	Ticker/Fund #	# of Shares/Units	Estimated Value \$
Security 2 (Name)	Ticker/Fund #	# of Shares/Units	Estimated Value \$
Security 3 (Name)	Ticker/Fund #	# of Shares/Units	Estimated Value \$
Security 4 (Name)	Ticker/Fund #	# of Shares/Units	Estimated Value \$

* If more than four securities are being contributed, attach a list of same with the information requested above to this form.

Section Four – Recommend Investment Strategy (Original Donors or Fund Successors Only)

The investment strategy for these newly gifted assets is:

- consistent with the *investment strategy documentation* on file; or
 as described in new *investment strategy documentation* provided to Gift Funds Canada.

Section Five – Authorizations & Understandings (Original Donors or Fund Successors Only)

The **CGFCF** is a registered charitable organization (BN # 89671 3500 RR0001) in Canada and is governed by the terms and/or conditions contained in the **Program Guide**.

By signing this form, I/we authorize and direct the CGFCF to make an additional contribution to the Fund with the property described in *Section Three – Description of Gifted Assets* of this Agreement.

I/We understand that this contribution made to the CGFCF is an **irrevocable** gift that is not refundable to me/us for any reason. I/We also understand that I/we will be entitled to a donation receipt for the fair market value of the contribution. Once contributions have been accepted, they are the property of the CGFCF, which is governed by an independent board of directors.

The CGFCF may use the personal information I/we have and/or will provide (for example name, address, contact information, donation history) to process my/our donations; administer its charitable services; verify my identity and protect against fraud; to satisfy regulatory obligations and other legal requirements.

In providing its charitable services, I/we understand that the CGFCF may have to share my/our personal information with other persons: where other parties are the CGFCF's third party service providers, suppliers or agents who assist the CGFCF in providing its services; and where it is required or permitted to do so by law.

To the best of my/our knowledge, all information disclosed is accurate, and I/we will immediately notify my Investment Advisor or the CGFCF if any changes occur. My/our signature(s) below evidence my/our agreement and acceptance of all terms, conditions and options selected in all parts of this Agreement and its attachments.

Original Donor's or Fund Successor's Signature(s) _____

Date _____

Section Six – To be completed by the Investment Advisor (If applicable)

Investment Advisor Name _____

Rep #: _____ Dealer #: _____ Branch #: _____

Company Name _____

Address _____

City _____ Province _____ Postal Code _____

Telephone _____ Fax _____ Email _____

Investment Advisor's Primary Administrative Contact on this CGF:

Assistant/Associate's Name _____

Title _____

Telephone _____ Fax _____ Email _____