



## 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 a community amenity and a visitor destination for visitors. BC Parks, our project partner, 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 made possible by **Nordiq Canada** with **CanadaHelps**<sup>1</sup>. Here is how to do it.

- **Complete the “Letter of Direction” online form.** In the form you provide details about your securities or mutual funds donation. In the Charity Fund pull-down menu, select the Sovereign Lake Lodge Legacy Project. Once complete, submit it electronically and download and/or print it. After submitting, you will receive an email confirming your pledge. CanadaHelps will receive and process your pledge. Access the form here: <https://www.canadahelps.org/en/dn/103500>
- **Send the completed Letter of Direction** to your broker or advisor to authorize the transfer of your shares to Canada Helps. It typically takes 1 to 2 working days for the transfer to settle within the CanadaHelps account.
- **CanadaHelps 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 (e.g., RBC Direct Invest, QuestTrade, etc.) you may need to complete the Direction Form available from your 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.