

LETTER OF DIRECTION

This form constitutes instructions for funds upon a donor's passing, from matured accounts, and for distributing loan surplus. For standard distributions and regular gifts, see our Distribution Form.

1. CONTACT INFORMATION

Donor(s):

Full Name(s):	Phone:	Email:
Address:	City:	Province:
		Postal Code:

Next of Kin: *(Contact information for an Executor, Power of Attorney, or a family member)*

Full Name:	Phone:	Email:	Relationship:
Address:	City:	Province:	Postal Code:

2. DISTRIBUTION

Beneficiaries:

Amount	Charity Name and Address
%	1.
%	2.
%	3.

Amount	Charity Name and Address
%	4.
%	5.
%	6.

Source of Funds:

From my account with Link Charity: Annuity / Loan / DAF / Donor (please specify):	From a gift in my Will: Cash / Securities / Registered Savings Plan (please specify):
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Schedule:

☐ To be distributed upon passing.	OR	☐ To be distributed evenly over 5 years upon passing.	OR	Other (please specify):
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Notes:

3. I / WE AGREE THAT

REVOCATION: This Letter of Direction revokes all previous instruction held by Link Charity from Donor for the funds specified above.

REDISTRIBUTION: In the event that a beneficiary no longer exists as a qualified donee, its share will be distributed equally to those remaining. In the rare event that no beneficiaries remain, Link Charity's Board of Directors will select alternatives to best match the mission and intent of the original list.

MINIMUM BALANCE: When a matured account balance falls below \$50,000.00, Link Charity will distribute the remaining balance in that fiscal year.

Signatures: