

# How to Give Your Gift

**Important: Attach a Copy of Recipient's Birth Certificate. If you don't have a copy at home, contact the vital statistics or social services department in the State where the recipient was born.**

## **STEP 1 Complete the Shareholder Form**

The shareholder form must be completed by the shareholder who is gifting the shares (the "donor"), also, at step one; list the name of each recipient and the number of shares you wish to give.

## **STEP 2 Stand beneath the Family Tree**

Fill in the individual branches and admire the tree as a whole. It is a history of your family and your ties to a Native Heritage in order to determine the recipient's blood Quantum, please list the birth parents and Grandparents of the recipient on the family.

## **STEP 3 Ask Recipient to complete The Recipient Form**

Each person receiving a gift of shares must fill out the necessary information on the recipient form and sign it in the presence of a notary public. If the recipient is under 18, the parent or legal guardian of the child must complete and sign the form on behalf of the recipient.

## **STEP 4 Recipient under 18 years of age, assign a custodian**

(if the recipient is 18 years of age or older, skip this step)

If the recipient of a gift of Haida Corporation Stock is under 18 years of age, a custodian must be appointed to hold the shares. The Custodian may be the recipient's parent, legal guardian, or the shareholder who is gifting the stock; the Custodian must complete the custodian consent form to accept the appointment.

## **STEP 5 Recipient must complete a W-9**

Every new shareholder must fill out a W-9 form. The recipient should include his or her name, address, social security number, & signature. The remaining boxes are used for Businesses and can be left blank in this case.

## **STEP 6 Release for publication**

This is an optional step. The "Release for Publication Form" is for the recipient (or the parent or guardian of a recipient under 18 years of age) to sign granting the release of the Recipient's name in the Haida Corporation shareholder and other promotional materials about gifting.

## **STEP 7 Send completed gift packet to Haida Corporation**

Make sure you and your recipient(s) complete the forms, attach all the necessary documents, and sign the forms in front of a notary public. Before you send the packet back to Haida Corporation. Once we get the completed packet back we will begin processing the information within three weeks.

Send your completed Haida Corporation Gifting Packet to:

**Haida Corporation  
P.O.Box 89  
Hydaburg, AK 99922**



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

# Step 1

## HAIDA CORPORATION SHAREHOLDER FORM

**Important: If you are a Haida Corporation shareholder and you wish to gift shares to a descendant, niece, nephew, or sibling, please complete this affidavit and sign it in front of a Notary Public**

I, \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
First Name M.I. Last Name

Date of Birth \_\_ \_\_ - - - - Social Security Number - - - - - - - -

Complete Mailing Address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

-----

Under oath, depose as follows:

1. Before making this gift, I now own \_\_\_\_\_ shares of common stock of Haida Corporation.
2. I understand that the Alaska Native Claims Settlement Act (43U.S.C. 1606) permits a Shareholder to give a gift of shares to his or her child, grandchild, great grandchild, niece, nephew, brother or sister.
3. I attest that I am at least 18 years old.
4. I wish to make a gift of shares to the recipient(s) shown on the reverse side of this document.
5. I understand that I cannot revoke, take back, or otherwise change this gift of shares once it has been made.
6. I understand that if there are taxes owed as a result of this transfer, Haida Corporation will not be responsible for payment, and that payment of any such taxes will either be my responsibility as donor, or the recipient's responsibility.
7. I understand that my gift places in the hands of the recipient all authority to transfer these shares by will or gift; that I will no longer have voting rights for these shares; and that I will no longer receive dividends or distributions for these shares.
8. I understand that by signing this affidavit, I am swearing under oath to the best of my knowledge and belief that everything stated herein is true, and that I am acting
9. Of my own free will and am not under any undue pressure, influence, or duress. I affirm that I have not received anything of value nor was I promised anything of value as compensation or payment for the stock I wish to transfer.



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

# Step 1 continued

**Important: List the name, address, and social security number of each recipient and the number of share you wish to give.**

1. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Recipient's First Name      M.I.      Last Name      Relationship to Donor  
(as appears on S.S. card)

Date of Birth    \_\_  \_\_  \_\_\_\_  Social Security Number    \_\_\_\_  -  \_\_  -  \_\_\_\_

\_\_\_\_\_  
Number of shares gifted

\_\_\_\_\_  
Recipient's Complete Mailing Address

\_\_\_\_\_  
City      State      Zip Code

2. \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Recipient's First Name      M.I.      Last Name      Relationship to Donor  
(as appears on S.S. card)

Date of Birth    \_\_  \_\_  \_\_\_\_  Social Security Number    \_\_\_\_  -  \_\_  -  \_\_\_\_

\_\_\_\_\_  
Number of shares gifted

\_\_\_\_\_  
Recipient's Complete Mailing Address

\_\_\_\_\_  
City      State      Zip Code

\_\_\_\_\_  
Total shares to be gifted

\_\_\_\_\_  
Shares retained by donor (If Any)

[ ] I am making more than two gifts. I have copied this form and included the remaining names on the ATTACHED COPY

**WAIT to sign this affidavit until you are in the presence of a notary public**

A NOTARY PUBLIC is an official witness who confirms your identity and signature. You can find this service at the Haida Corporation Office, Banks, Law Firms, and at the U.S. Post Office.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
(Month)      (Year)      Shareholder Signature

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_

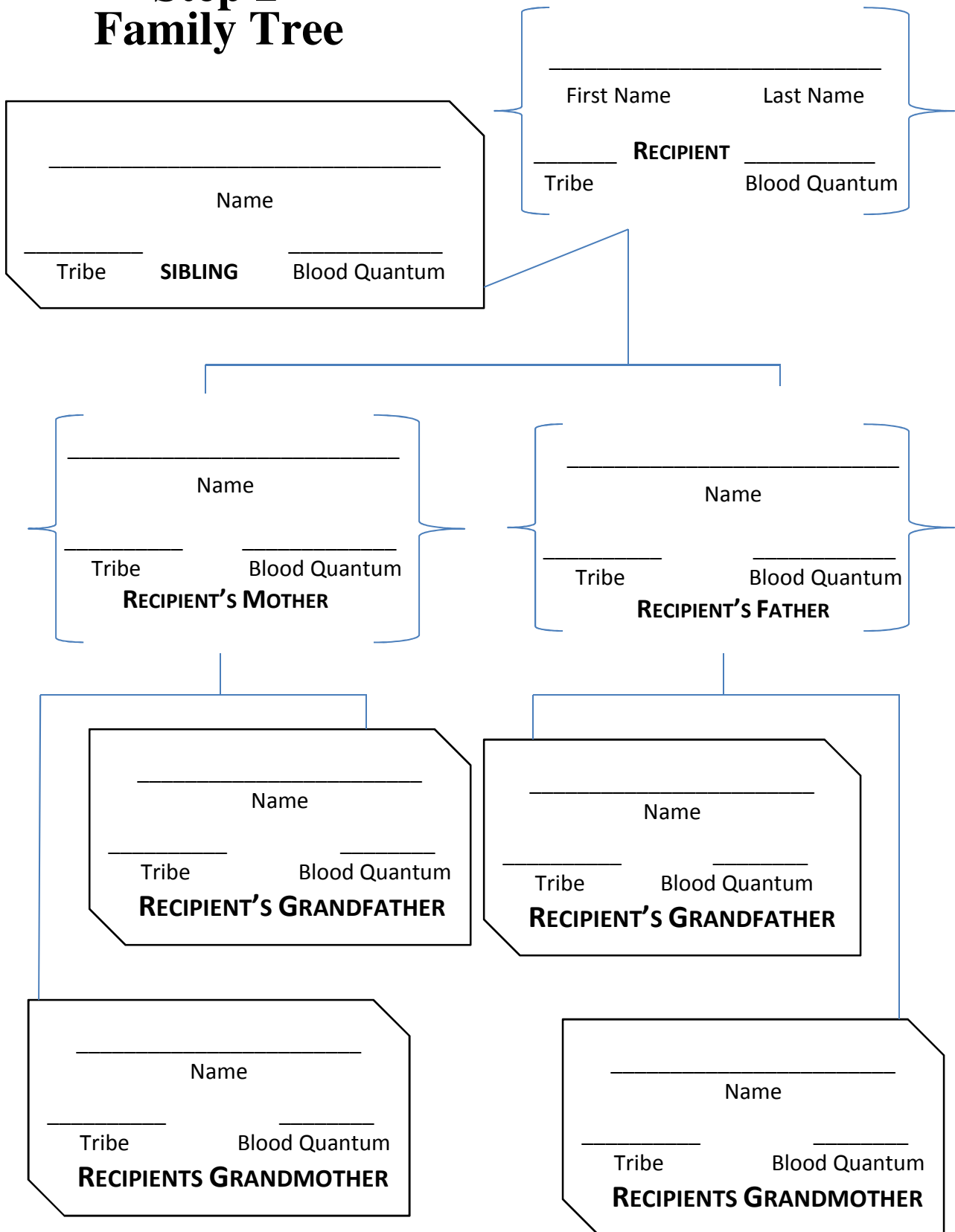
\_\_\_\_\_  
Notary Public in and for      commission expires:    \_\_ / \_\_\_\_ / \_\_\_\_



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

# Step 2 Family Tree



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

# RECIPIENT FORM

# Step 3

**Important:** If you are the recipient of a gift of stock from a shareholder. You must complete this affidavit and sign it in front of a notary public.

I, \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
First Name M.I. Last Name

Date of Birth \_ \_ \_ \_ \_ Social Security Number \_ \_ \_ - \_ \_ - \_ \_ \_ \_

Complete Mailing Address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Under oath, depose as follows:

I understand that if the proposed gift is approved, I will receive \_\_\_\_\_ Share(s) of Haida Corporation stocks as a gift from \_\_\_\_\_

I have not paid, transferred, or promised anything of value to obtain these shares.

I understand that if this gift is approved, I will have the following rights and Responsibilities with regard to the shares:

- a) *At shareholder meetings, either in person or by proxy, I will be responsible for voting my shares.*
- b) *I will be responsible for determining the future ownership of my shares by Gift or will.*
- c) *I will be entitled to receive distributions or dividends issued by Haida Corporation based on the amount of shares I own.*
- d) *I will be responsible for paying whatever taxes may be owed as a result of receiving this gift of shares.*

I understand that the law does not allow me to return the shares, except as a gift to a brother or sister, and then only if I am over the age of 18. I understand that my signature below indicates my acceptance of the proposed stock Gift and my request that Haida Corporation complete the transfer of shares from the Shareholder named above to me.

A NOTARY PUBLIC is an official witness who confirms your identity and signature. You can find this service at the Haida Corporation Office, Banks, Law Firms, and at the U.S. Post Office.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
(Month) (Year) Shareholder Signature

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ at \_\_\_\_\_

\_\_\_\_\_  
Notary Public in and for \_\_\_\_\_ commission expires: \_\_\_ / \_\_\_ / \_\_\_



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

# Step 4

## HAIDA CORPORATION APPOINTMENT OF CUSTODIAN & CUSTODIAN CONSENT TO APPOINTMENT

In the matter of \_\_\_\_\_, a minor.

This document appoints (print full legal name) \_\_\_\_\_

As custodian of all Stock and other property that the above named minor is and may later be entitled to receive from Haida Corporation, pursuant to the Alaska Native Claims Settlement Act. This appointment complies with Alaska Statute 13.46.085, as set forth on the following (2) pages hereof, The custodian's full mailing address is:

\_\_\_\_\_  
\_\_\_\_\_

The undersigned hereby consents to and accepts appointment as custodian for the above named minor, and agrees to receive and hold as custodian all Stock and Property distributed that the minor may be entitled to receive from Haida Corporation. The undersigned further agrees to collect, hold, manage, invest and reinvest the custodial property in accordance with the Alaska uniform Transfer to Minors Act, as it may be amended or replaced from time to tome. The undersigned acknowledges having read and understood Alaska Statutes 13.46.110 (both set forth on the following (2)Pages hereof, which are sections of the Alaska Uniform Transfer to Minors Act that addresses the appointment, power and duties of custodians for minors

\_\_\_\_\_  
Custodian's Signature

\_\_\_\_\_  
Date

Family or legal relationship of custodian to the above named individual:  
\_\_\_\_\_

### Note:

*Upon the date of the minor's 18<sup>th</sup> birthday, it is Haida Corporation's policy to reissue Stock Standing in the custodian's name into that of the Shareholder.*



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification (required): <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	
	<input type="checkbox"/> Exempt payee	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

<b>Part I Taxpayer Identification Number (TIN)</b>																																					
Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.																																					
<b>Note.</b> If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="9" style="text-align: center;">Social security number</th> </tr> <tr> <td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="9" style="text-align: center;">Employer identification number</th> </tr> <tr> <td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td><td style="width: 20px; height: 20px;"> </td> </tr> </table>	Social security number																		Employer identification number																	
Social security number																																					
Employer identification number																																					

<b>Part II Certification</b>	
Under penalties of perjury, I certify that:	
<ol style="list-style-type: none"> <li>1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and</li> <li>2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and</li> <li>3. I am a U.S. citizen or other U.S. person (defined below).</li> </ol>	
<p><b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.</p>	

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

#### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

# Step 6

## RECIPIENT FORM

### **\*RELEASE FOR PUBLICATION\***

I hereby consent to the publication of my name and home town in the Haida Corporation newsletter or promotional materials published by Haida Corporation. I understand that this publication will take the form of an article, brochure or feature welcoming new shareholders or promoting stock gifting, and may appear more than once.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
(Month) (Year) Signature

Type or Print name \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
First Name M.I. Last Name

*\*This form does not need to be signed in the presence of a Notary Public*

### **\*RELEASE FOR PUBLICATION FOR A MINOR\***

*(recipient under the age of 18)*

I, the undersigned parent or legal guardian of the minor child \_\_\_\_\_  
First and last name

Consent to the publication of the Child's name and home town in the Haida Corporation newsletter or promotional materials published by Haida Corporation. I understand that this publication will take the form of an article, brochure or feature welcoming new shareholders or promoting stock gifting, and may appear more than once.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
(Month) (Year) Signature of parent or legal

Guardian

Type or Print name \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
First Name M.I. Last Name

*\*This form does not need to be signed in the presence of a Notary Public*



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*



# Step 7

## Send Completed form to Haida Corporation

**\*IMPORTANT:** Please take a few minutes to go through your completed packet to make sure that all of the steps have been followed and all of the pieces are together

### DID YOU....

- Fill Out all of the forms clearly?
- List the name, address and social security number of each recipient along with the number of shares you wish to give?
- Include a copy of each recipient's Birth Certificate?
- Sign the Shareholder Form (from step 1) in the presence of a Notary Public?
- Fill in as much of the Family Tree (step 2) as you can?
- Insure Recipient Form (step 3) was signed in the presence of a Notary Public?
- Include a Custodian Consent Form (step 4) for any recipient under the age of 18?
- Include a W-9 Form (step 5) for each recipient?
- Sign the release for publication form (step 6)?

Send your completed Haida Corporation Shareholder Gifting Packet to:

HAIDA CORPORATION  
P.O.Box 89  
Hydaburg, AK 99922

### FAQ – ANSWERS TO YOUR QUESTIONS

We have provided answers to frequently asked questions about the gifting of shares process. If you do not find the answers to some of your questions here, please feel free to contact the Haida Corporation office at 907-285-3721

Q. Who can give a gift of Haida Corporation Shares?

A. Any Haida Corporation Shareholder over the age of 18 can give shares as a gift.

Q. Who can receive a gift of Haida Corporation shares?

A. A recipient can be the shareholder donor's child, grandchild, niece, nephew, brother, or sister, either by birth or by legal adoption that occurred before the child was 18 years old.



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*

## Step 7 continued

Q. Does the recipient have to be an Alaska Native?

A. A person who receives a gift of shares must either be an Alaska Native or a Descendant of a Native, including adopted descendants. Therefore, a recipient need not have a particular blood quantum to be eligible to receive a gift of Shares.

Q. Why do shareholders give some of their shares away as gifts?

A. Shareholders give shares as gifts for many reasons. For example, some do it to celebrate a child's birthday or high school graduation. Others do it to pass on Shareholder benefits to their descendants, so they can enjoy them too. A sister Might give some of her shares to her younger brother if he was born after December 18, 1971, the ANCSA enrollment cut-off date.

Q. How many shares can a shareholder give away?

A. Shareholders can give any number of shares as a gift. They can give one share, five shares, twenty shares, or every share they own. It's up to the shareholder to decide, though we recommend a shareholder give at least two shares.

Q. Can a gift be a fraction of a share?

A. NO. The gift must be given in whole shares. For example, a donor who wishes to divide 50 shares among her three children could give 17 shares to two children and 16 to the third child.

Q. Is a gift of shares to a minor any different than a gift to an adult?

A. If the recipient is under the age of 18, the shares will be held by a custodian (usually the parent or legal guardian, or the donor of the gift) until the recipient turns 18.

Q. What about a relative of a shareholder's husband or wife?

A. The recipient must be related to the shareholder by blood or legal adoption, not by marriage. Therefore, you cannot gift shares to your spouse's niece, or nephew.

Q. Can the shareholder revoke or undo the gift later? Or can the recipient return the shares to the donor?

A. NO. Once the gift of shares is given, the shareholder no longer has authority over those shares. They belong wholly to the person who received them. The only recipient who can return shares is a sibling who is over the age of 18.

Q. What if I don't know the blood quantum of my family members?

A. You can get this information by calling your local Bureau of Indian Affairs office and asking for a Certificate of Indian Blood (CIB). Be prepared to provide them with the Birth Certificate (original, as they do not except copies)

Q. How long does it take to give a gift of shares?

A. Once Haida Corporation has received the Completed Documents from the Shareholder and recipient; it takes only about 2-3 weeks.

Q. If I am' gifting shares to more than one recipient, do I need more than one packet?

A. NO. We have provided paperwork for up to two recipients within this packet. If You are gifting to more than two recipients at one time, please photo copy the Recipient Form, Family Tree and W-9 Forms for them;

**\*\* Remember to Attach a Birth Certificate for each Recipient\*\***



**HAIDA CORPORATION**

*Our Mission is to Protect Our Land and Spirit*