



**INSTRUCTIONS FOR MAKING A GIFT OF PUBLICLY-TRADED SECURITIES TO
BROCKVILLE & DISTRICT HOSPITAL FOUNDATION**

STEP 1 Download/Complete the Securities Transfer Form including the CUSP # of the assets being transferred (the gift) and send to your broker via fax or email to begin transfer process.

STEP 2 Also email the completed form to the Brockville & District Hospital Foundation and their Broker notifying them of the pending gift.

Emily Maskell, Brockville & District Hospital Foundation

Email: emaskell@brockvillegeneralhospital.ca

Alycia Cosentino, Associate, RBC Dominion Securities

Email: alycia.cosentino@rbc.com

Brockville & District Hospital Foundation (BDHF) is the registered charity (Charitable Registration (B.N.) 13049 8728 RR0001). The donated securities are normally sold by BDHF, and the net proceeds from the sale will be available for the gift designation as described on the Securities Transfer Form.

Other than possible income tax benefits and any recognition that BDHF may provide at its sole discretion in accordance with its practice of acknowledging gifts of this nature, the Donor confirms that neither the Donor, nor any person related to the Donor, will receive a benefit or advantage of any kind, now or in the future as a result of the Donor making the gift.

Electronic delivery can take 2-10 days depending on the broker, though 2 days is typical. Mutual funds can take 10-30 days.

Once the securities transfer has completed and confirmed, CHF will issue a charitable tax receipt to the donor. For valuation purposes, the value of the gift shall be the closing market price of the securities comprising the gift at the time the gift is received by CHF.

If you have questions or need more information, please contact:

Emily Maskell

Brockville & District Hospital Foundation

613.345.4478

emaskell@brockvillegeneralhospital.ca

SECURITIES TRANSFER FORM

Donor Information

First Name _____ Last Name _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____ Foundation Contact _____

Description of Securities - Equities/Mutual Funds/Bonds

This form will confirm my intention to donate the following securities to Calgary Health Foundation:

Security Description _____ Quantity _____ CUSIP/ISIN/FUND CODE _____

Security Description _____ Quantity _____ CUSIP/ISIN/FUND CODE _____

Security Description _____ Quantity _____ CUSIP/ISIN/FUND CODE _____

Broker

Name of Firm _____ FINS# _____ Fax _____

Name of Broker _____ Email _____ Phone _____

Account Name _____ Client Account Number _____

Gift Designation

Highest Priority Needs of BDHF (default) or

Specific Designation: _____

Donor Authorization

I wish to make a charitable gift consisting of listed securities to the Brockville & District Hospital Foundation(B.N.) 13049 8728 RR0001. Further to this, please accept this form as my authorization for you to transfer in-kind, the above listed securities from my brokerage account to the Brockville & District Hospital Foundation custody account held at RBC Dominion Securities (trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from the Brockville & District Hospital Foundation. The amount of the receipt will be based on the value as of the close of trading on the date they are received by the Brockville & District Hospital Foundation in their custody account.

Signature: _____ Date: _____

RBC Dominion Securities ACCOUNT: 504-02390-13 **CUID:** DOMA

DTC: 5002 **ADDRESS:** 82 King Street. W Brockville, ON K6V 3P9

Brokerage House Contact: Alycia Cosentino (613) 345-7750

75 Charles Street, Brockville, ON K6V 1S8

P: 613.345.4478 **E:** emaskell@brockvillegeneralhospital.ca

Charitable Registration Number (B.N.) 13049 8728 RR0001