

# AUTHORIZATION TO BROKER SECURITIES TRANSFER



Please complete this authorization and provide it to your Broker.

Email a PDF or JPG copy: [admin@bphfoundation.com](mailto:admin@bphfoundation.com) prior to the transfer so your donation can be tracked and charitable receipt provided in a timely fashion.

## A. DONOR INFORMATION:

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Name Daytime Phone

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Address City Province Postal Code

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Email

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Signature Date

## B. BROKER INFORMATION:

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Broker Name Financial Institution

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Phone Email Account # (optional)

## C. SECURITIES TO BE DONATED:

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Number of Shares/Units Name of Security

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CUSIP # Expected Date of Transfer

Use my gift wherever the need is greatest  Other Designation \_\_\_\_\_

## FOUNDATION ACCOUNT INFORMATION:

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T002	DOMA	5002	9190
Receiving Institution: RBC Direct Investing			For: BPH Foundation – Acct. #66840734 1-1	

**Donor inquiries:** April Patry, BPH Foundation 519-534-5856

**Broker inquiries:** RBC Direct Investing 800-769-2560

## HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain a copy of this "Authorization to Broker" by calling 519-534-5856 or downloading it from our [website](#). This is your instruction to your broker to transfer securities "in kind". **If you use a self-service, online brokerage such as BMO Investorline or Scotia itrade, contact us for assistance.**
2. Complete all sections of this form, especially the CUSIP # (provided by your broker/investment advisor and acts like a transaction number in case the transfer needs to be tracked). For privacy reasons, your broker may not disclose your name. Please complete the Donor Information section and include a daytime phone number.
3. Provide your completed Authorization to your broker/advisor who is responsible for the transfer.
4. **Please notify us** by forwarding a copy of this form to the Foundation either in person, by emailing a PDF or JPG or via fax. This will ensure you receive our thanks, appropriate recognition and your official receipt for income tax purposes in a timely manner.

## ADDITIONAL INFORMATION:

Your receipt will be based on the closing price of the securities on the day they are received into the Foundation's account. It is our policy to redeem donated securities as soon as possible. **If you plan to donate securities that are thinly traded, volatile or not easily liquidated**, please call us before initiating the transfer. All gifts are subject to review, approval and acceptance by the Foundation.

## ABOUT BRIGHTSHORES BRUCE PENINSULA HOSPITALS FOUNDATION:

Bruce Peninsula Hospitals Foundation was incorporated in 1997. We strive to provide our physicians, nurses and technologists with up-to-date diagnostic and medical equipment to care for patients. With this ongoing challenge, our mission is to assist in meeting the health care needs of residents and visitors to the Bruce Peninsula by raising funds for priority hospital projects.

Our fundraising efforts support Brightshores Health System - Lion's Head Hospital, Wiarton Hospital plus regional care provided at other hospitals. With your generosity we can keep great health care close to home!

### PLEASE CONTACT:

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