

CARING FOR TOMORROW

SECURITIES TRANSFER



DONOR AUTHORIZATION TO BROKER

Please complete this authorization for your Broker. **Email a PDF or JPG copy:** admin@bphfoundation.com **or fax:** 519-534-2712 prior to the transfer so we can track your donation and provide your charitable receipt.

A. DONOR INFORMATION:

Name		Daytime Phone	
Address	City	Province	Postal Code
		Email	
Signature		Date	

B. BROKER INFORMATION:

Broker Name	Financial Institution
Daytime Phone	Email

C. SECURITIES TO BE DONATED:

Number of Shares/Units	Name of Security
CUSIP #	Expected Date of Transfer
<input type="checkbox"/> Use my gift wherever the need is greatest	<input type="checkbox"/> Other designation _____

ACCOUNT INFORMATION FOR BRUCE PENINSULA HOSPITALS FOUNDATION

Donor inquiries: April Patry, BPH Foundation 519-534-5856
Broker inquiries: RBC Direct Investing 800-769-2560

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

HOW TO MAKE YOUR GIFT:

Following these four steps will help you quickly and easily donate stocks, bonds or mutual funds:

1. **Obtain a copy of this “Donor Authorization to Broker”** by calling 519-534-5856 or downloading it from www.bphfoundation.com. This is your instruction to your broker to transfer securities “in kind” to the Foundation.
2. **Complete all sections of the authorization 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 cannot disclose your name to us, so please complete the Donor/Client Information, including a daytime phone.
3. **Provide your completed authorization to your broker/investment advisor** who will initiate and be responsible for the transfer.
4. **Please notify us** by returning the completed authorization form to the Foundation either in person, by emailing a PDF or JPG or by fax. Notifying us will ensure you receive our thanks, appropriate recognition and your official receipt for income tax purposes in a timely manner. **Copies can be emailed to admin@bphfoundation.com or faxed to 519-534-2712.**

ADDITIONAL INFORMATION:

Your receipt will be valued based on the closing price of the securities on the day they are received into the Foundation’s brokerage account. It is our policy is that all securities donated are redeemed 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 US:

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 Grey Bruce Health Services’ Lion’s Head Hospital, Wiarton Hospital and our regional hospital in Owen Sound. With your generosity we can keep great health care close to home!



BRUCE PENINSULA HOSPITALS FOUNDATION

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Charitable Registration # 88928 8049 RR0001

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Facebook: [@bphsfoundation](https://www.facebook.com/bphsfoundation)

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This information provides a brief overview on planning a gift to Bruce Peninsula Hospitals Foundation. The information is general in nature and is subject to change according to individual circumstances. You should always consult your own professional advisors for detailed information tailored to your own situation and to confirm applicable tax benefits.