

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 | |
| Phone | Email | Account # (optional) | |

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 1-1 | | |

HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain a copy of this “Donor 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” to the Foundation. **If you use the services of a self-service, online brokerage such as BMO Investorline or Scotia iTrade, please contact the Foundation for assistance.**
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 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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Willard VanderPloeg, Charitable Giving Advisor

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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.