

Charitable Donation of Securities Share Transfer Authorization Form



Attn: _____

Name of Your Broker (First, Last)

Please accept this form as authorization to transfer _____

Number/Amount of Shares

Shares of _____

Name of Shares/Company

Currently held with _____

Your Brokerage Firm

From account _____

Your Account Number

Designation: Stratford Perth Hospice Foundation

This donation of shares will be transferred through Stratford Perth Hospice Foundation's brokerage firm:

Broker: BMO Nesbitt Burns
Account number: 440-33209-16
FIN number: T009
CUID number: NTDT
Contact Name: Ashley Dubrick, Administrative Assistant
BMO Nesbitt Burns
Telephone: 519-273-0474
Fax: 519-273-7320
Email: ashley.dubrick@nbpcd.com

Name of Donor (first, last)

Mailing Address

City

Province

Postal Code

(____) _____ - _____
Telephone Email address

Donor Authorization:

Donor Signature

Date

Steps to making a gift of securities:

1. Contact Stratford Perth Hospice Foundation to advise us that you wish to make a gift of securities and complete this Share Transfer Authorization Form.
2. If you work with an investment advisor, inform them of your plans to make a gift of securities. They will help you complete this form.
3. If you self-manage your investments, the Foundation is available to help you complete this form and guide you through the transfer process.
4. Once form is completed (even if you send it to your transfer department), please email a copy to Ashley Dubrick at BMO Nesbitt Burns: ashley.dubrick@nbpcd.com
5. Email a duplicate copy to Attn: Lucie Stuart at Stratford Perth Hospice Foundation: lucie@rotaryhospice.ca
6. A donation receipt will be issued to you for the closing price of the securities on the day they are received by the Foundation's brokerage firm.

Stratford Perth Hospice Foundation
80 Greenwood Dr., Stratford, ON
N5A 0J1
519-508-4900 ext. 720
www.rotaryhospice.ca
Charitable Reg. #: 72776 0126 RR0001