

# DONOR AUTHORIZATION TO BROKER

## SECURITIES TRANSFER



Please complete this authorization for your Broker. **Email a PDF or JPG copy:** [amckinnon@brightshores.ca](mailto:amckinnon@brightshores.ca) or **fax:** 519-372-3950 prior to the transfer so we can track your donation and provide your charitable receipt.

### A. DONOR:

Name		Daytime Phone	
Address		City	Province
		Postal Code	
		Email	
Signature		Date	

### B. BROKER:

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

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: Brightshores Owen Sound Foundation - Acct. #68952422 1-9

Donor inquiries: Amy McKinnon, [amckinnon@brightshores.ca](mailto:amckinnon@brightshores.ca)

519-372-3925

Broker inquiries: RBC Direct Investing

800-769-2560

## HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain a copy of this “Donor Authorization to Broker” by calling 519-372-3925 or downloading it from our [website](#). This is your instruction to your broker to transfer securities “in kind” to the Foundation. **If you use a self-service brokerage such as BMO Investorline or Scotia iTrade, please contact us for assistance.**
2. Complete all sections of the 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 who will be responsible for the transfer.
4. **Please notify us** by returning this form to the Foundation in person, by emailing a PDF or JPG or by fax. This helps ensure that you receive our thanks, appropriate recognition and your official receipt for tax purposes in a timely manner. Copies can be emailed to [amckinnon@brightshores.ca](mailto:amckinnon@brightshores.ca) or faxed to 519-372-3950.

## 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 donated securities 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 THE FOUNDATION:

Brightshores Health System Owen Sound Foundation is a registered charitable organization that raises funds for equipment, facility improvements and staff development in support of regional programs, primarily located in Owen Sound. A Board of Directors comprised of volunteers from the community governs the Foundation.

The Ontario Ministry of Health provides very little funding to hospitals for equipment purchases. Hospitals rely on the generosity of their communities to purchase new and replacement medical equipment, maintain and improve facilities and support continuing education for our medical professionals.

### PLEASE CONTACT:

Amy McKinnon, CEO  
519-372-2925 or 519-378-6430  
[amckinnon@brightshores.ca](mailto:amckinnon@brightshores.ca)

**Brightshores Health System Owen Sound Foundation**  
1800 8th Street East, Owen Sound, ON N4K 6M9  
[www.brightshoresfoundation.ca/securities](http://www.brightshoresfoundation.ca/securities)



Charitable Reg. #124052507 RR0001

This information provides a brief overview on planning a gift to Brightshores Health System Owen Sound Foundation. It is general in nature and subject to change according to individual circumstances. You should always consult your own professional advisors for detailed information tailored to your own circumstances and to confirm applicable tax benefits.