

AUTHORIZATION TO BROKER

SECURITIES TRANSFER



Please complete this authorization and provide it to your Broker who will initiate the transfer.

Email a PDF or JPG copy to amckinnon@brightshores.ca so your donation can be tracked and charitable receipt provided in a timely fashion.

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 519-372-3925
 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 519-372-3925 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. 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.

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 BRIGHTSHORES HEALTH SYSTEM OWEN SOUND FOUNDATION:

The Foundation is dedicated to supporting Brightshores Health System by fundraising for medical equipment, facility improvements, staff education, and research. On average, the Foundation raises more than \$3.5 million annually to support the advancement of medical care for the people of Owen Sound and the wider population of Grey and Bruce counties.

PLEASE CONTACT:

Amy McKinnon, CEO
519-372-2925 or 519-378-6430
amckinnon@brightshores.ca

www.brightshoresfoundation.ca/securities



1800 8th Street East,
Owen Sound, ON N4K 6M9
Charitable # 124052507 RR0001