



Three easy steps to make a stock donation that saves lives.

Step 1:

Please complete all sections of the securities transfer form attached.

For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor Information section, including your daytime phone number with area code. Your advisor/broker will provide the CUSIP # which acts like a transaction number in case the transfer needs to be tracked.

Step 2:

Send a copy of the completed transfer form to Shareen Weekes, Sr. Administrative Assistant at the Heart and Stroke Foundation.

This step is important because securities are transferred into our account anonymously, without your name listed. Notifying us will ensure you receive your official receipt for income tax purposes.

Fax #: (416) 640-1479

Contact info:

Shareen Weekes, Sr. Administrative Assistant

Heart and Stroke Foundation

1300-2300 Yonge Street, Box 2414, Toronto, ON M4P 1E4

Ph: (647) 943-3104

Email: shareen.kallianweekes@heartandstroke.ca

Step 3:

Fax or send the completed transfer form to your broker or investment advisor.

Your broker or investment advisor is responsible for initiating the transfer.

Additional Information: Shares/stocks are considered legally transferred only when our custodial agent confirms delivery. Your receipt will be valued based on the closing price on the day when the shares are legally transferred to the Foundation's account.

The Heart and Stroke Foundation's policy for the sale of donated securities is to sell the shares as soon as possible after they have been received.

Thank you for your generosity!

heartandstroke.ca

Securities Transfer Form

From Donor to Broker

Please fax a copy of the completed form before proceeding with your securities transfer to:

Heart & Stroke Foundation

Fax #: (416) 640-1479

If you have any questions regarding this form, or your donation, please contact:

Shareen Weekes,
Sr. Administrative Assistant

Ph: (647) 943-3104

Email:

shareen.kallianweekes@heartandstroke.ca

Heart and Stroke Foundation
1300-2300 Yonge Street
Box 2414
Toronto, ON M4P 1E4

CRA Business #:
10684 6942 RR0001

**Thank you for
your philanthropy!**

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Donor Information (required for tax receipting purposes)

The stock will be valued at the closing price on the date it is received in the Heart and Stroke Foundation brokerage account.

Name: _____

Address: _____

City: _____ **Prov.:** _____ **PC:** _____

Ph: () _____ **Cell:** () _____

Email: _____

Broker Information

Company Name: _____

Contact Name: _____

Ph: () _____

Email: _____

Transfer securities from:

Account #: _____

Securities to be donated:

Security Name	# of units/Shares	CUSIP# / symbol
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Security Name	# of units/Shares	CUSIP# / symbol
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I authorize the Heart and Stroke Foundation, or its agent, to contact my broker for the purposes of concluding this transaction.

Signature: _____ **Date:** _____

Transfer securities to:

HollisWealth
Attn: Richard Bernstein

Dealer Code - 7923

CUID: NBCS

DTC#: 5008

Account #: _____

Please call Shareen at the Heart and Stroke Foundation for the **account number**

Thank you for your generosity!

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