



# 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:

**Please notify the Heart and Stroke Foundation for processing.**

Fax a copy of the completed transfer form to the Heart and Stroke Foundation.

This step is important because securities are transferred into our account without your name. We value every gift and want to provide you with an accurate tax receipt and appropriate recognition to honour your donation. Therefore, it is important for us to receive your name and address details.

**Fax #:** (403) 237-0803

**Contact info:**

**John Masters, Vice President, Development**

Heart and Stroke Foundation (Alberta, NWT & Nunavut)  
100-119 14 Street NW, Calgary, Alberta T2N 1Z6

**Ph:** (403) 351-7034

***Please note:***

*Stock-trading information should not be communicated electronically  
and therefore should not be submitted through email or left on voice mail.*

## 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 #: (403) 237-0803

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

**John Masters,**  
**VP, Development**  
Ph: (403) 351-7034

Heart and Stroke Foundation  
100-119 14 Street NW,  
Calgary, Alberta T2N 1Z6

CRA Business #:  
10684 6942 RR0001

**Thank you for  
your philanthropy!**

**heartandstroke.ca**



### 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 #: \_\_\_\_\_

**Thank you for your generosity!**

**heartandstroke.ca**