



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 #: (902) 462-1464

Contact info:

Christine Baker, Vice President, Philanthropy

Heart and Stroke Foundation (Nova Scotia)
Park Lane Mall, Level 3, 5657 Spring Garden Road, Box 245
Halifax, NS B3J 3R4

Ph: (902) 423-7530 ext. 1122
(902) 334-1122

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

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

Heart & Stroke Foundation
Fax #: (902) 492-1464

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

Christine Baker,
Vice President, Philanthropy
Ph: (902) 423-7530 ext. 1122
Direct Ph#: (902) 334-1122
Email: christine.baker@heartandstroke.ca

Heart and Stroke Foundation
Park Lane Mall, Level 3
5657 Spring Garden Road
Box 245
Halifax, NS B3J 3R4

CRA Business #:
10684 6942 RR0001

Thank you for
your philanthropy!

heartandstroke.ca



Securities Transfer Form From Donor to Broker

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:

Dealer Code - 7923

CUID: NBCS

DTC#: 5008

Account #: _____

HollisWealth

Attn: Richard Bernstein

Thank you for your generosity!

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