



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) 368-7068

Contact info:

Charlotte Comrie, Chief Executive Officer

Heart and Stroke Foundation (PEI)
180 Kent St. PO Box 279, Charlottetown, PEI, C1A 7K4

Ph: (902) 892-7441

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.

HollisWealth.

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) 368-7068

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

Charlotte Comrie, CEO
Ph: (902) 892-7441
Email: charlotte.comrie@heartandstroke.ca

Heart and Stroke Foundation
180 Kent St. PO Box 279,
Charlottetown, PEI
C1A 7K4

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
Security Name	# of units/Shares	CUSIP# / symbol

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!

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