



# 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 #:** (204) 957-1365

### **Contact info:**

**Andrew Kussy, Development Advisor, Manitoba and Saskatchewan**

Heart and Stroke Foundation  
6 Donald Street, Winnipeg, MB R3L 0K6

**Ph:** (306) 500-6024

### **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 at our custodial agent RBC Dominion Securities.

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 #:** (306) 664-4016

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

**Andrew Kussy,**  
**Development Advisor**  
**Ph:** (306) 500-6024  
**Email:** andrew.kussy@heartandstroke.ca

Heart and Stroke Foundation

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

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:

RBC Dominion Securities Inc.  
CUID: DOMA  
DTC#: 5002

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

### Attn: Jim Murphy

Ph: (306) 956-7809  
Fax: (306) 956-5252  
Email: jim.d.murphy@rbc.com

Please call Andrew for the Heart and Stroke Account number