



**Heart&Stroke™**

# 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 identification # 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 Ruth Cashell, 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:**

**Ruth Cashell, Sr. Administrative Assistant**

Heart and Stroke Foundation

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

**Ph:** (647) 943-3104

**Email:** [ruth.cashell@heartandstroke.ca](mailto:ruth.cashell@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 at our custodial agent, 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](http://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:

**Ruth Cashell,**  
**Sr. Administrative Assistant**  
Ph: (647) 943-3104  
Email: ruth.cashell@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!**

**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:

CUID: SCOH

DTC#: 5039

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

**HollisWealth**

**Attn: Richard Bernstein**

Please call Ruth at the Heart and Stroke Foundation for the account number.