



**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 CUSIP # which acts like a transaction number in case the transfer needs to be tracked.

## **Step 2:**

**Send a copy of the completed transfer form for processing to Paula McKinley at the Heart and Stroke Foundation of New Brunswick for processing.**

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 #:** (506) 648-0098

### **Contact info:**

**Paula McKinley, Director, Strategic Partnerships**

Heart and Stroke Foundation of New Brunswick  
580 Main Street, Suite B210 Saint John, NB E2K 1J5  
Saint John, New Brunswick E2L 2B5

**Ph:** (506) 634-2055 ext. 2064

### **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 ScotiaMcLeod.

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 #:** (506) 648-0098

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

**Paula McKinley,**  
**Director, Strategic Partnerships**  
**Ph:** (506) 634-2055 ext. 2064  
**Email:** pmckinley@hsf.nb.ca

Heart and Stroke Foundation  
580 Main Street, Suite B210  
Saint John, NB E2K 1J5 Saint John, New Brunswick E2L 2B5

CRA Business #:  
11924 6940 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:

ScotiaMcLeod  
CUID: SCOT  
DTC#: 5011

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

### Paul Sexton, Wealth Advisor

Ph: (506) 631-3191  
Fax: (506) 658-3315