



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 Heart & Stroke for processing by faxing a copy of the completed transfer form to the number below.

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) 492-1464

Contact info:

Christine Baker, Vice President, Philanthropy

Heart & Stroke (PEI)

180 Kent St. PO Box 279, Charlottetown, PEI, C1A 7K4

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 Heart & Stroke's account at our custodial agent HollisWealth.

Heart & Stroke'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
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 & Stroke
180 Kent St. PO Box 279,
Charlottetown, PEI
C1A 7K4

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 & Stroke 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 & Stroke, or its agent, to contact my broker for the purposes of concluding this transaction.

Signature: _____ Date: _____

Transfer securities to:

CUID: NBCS
DTC#: 7923

HollisWealth
Attn: Raymond Choo

Account #: _____

Please call Christine Baker at Heart & Stroke for the account number.

Thank you for your generosity!

heartandstroke.ca