



# 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 to Shareen Weekes, Sr. Administrative Assistant at the Heart & Stroke.**

**This step is important because securities are transferred into our account without your name listed. 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 #:** (416) 489-0102

**Contact info:**

**Shareen Weekes, Sr. Administrative Assistant**

Heart & Stroke

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

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

**Email:** [shareen.kallianweekes@heartandstroke.ca](mailto:shareen.kallianweekes@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 Heart & Stroke's account at our custodial agent RBC Dominion Securities.

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](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

Fax #: (416) 489-0102

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

**Shareen Weekes,**  
**Sr. Administrative Assistant**

Ph: (647) 943-3104

Email: shareen.kallianweekes@

heartandstroke.ca

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

CRA Business #:  
10684 6942 RR0001

Thank you for  
your philanthropy!

[heartandstroke.ca](http://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:

**HollisWealth**  
**Attn: Raymond Choo**

Dealer Code - 7923

CUID: NBCS

DTC#: 5008

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

Please call Shareen at the  
Heart & Stroke for the account number

**Thank you for your generosity!**

[heartandstroke.ca](http://heartandstroke.ca)