



# 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 Gabrielle Payette-Hébert, Legacy Advisor at 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 #:** (514) 871-9385

**Contact info:**

**Gabrielle Payette-Hébert, Legacy Advisor**

Heart & Stroke  
1434 Sainte Catherine St. West, Suite 500, Montreal, Quebec H3G 1R4

**Phone:** (514) 871-8038 x 20246

**Email:** Gabrielle.Hebert@coeuretavc.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 #: (514) 871-9385

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

### Gabrielle Payette-Hébert Legacy Advisor, Quebec

Ph: (514) 871-8038 x20246

Email:

Gabrielle.Hebert@coeuretavc.ca

Heart & Stroke  
1434 Sainte Catherine St. West  
Montreal, Quebec  
H3G 1R4

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:

RBC Dominion Securities

CUID: DOMA

DTC#: 5002

EUROCLEAR#: 90065

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

Attn: Claudio Resciniti

Vice President

Ph: (514) 840 -7600

Fax: (514) 840-7663

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

Thank you for your generosity!

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