



A lifesaving gift, a legacy of hope

# Making a gift of securities

## A step-by-step guide

### Step 1:

**Contact the Heart & Stroke Securities Administrator by phone at 403-351-7051 or by email at [securities@heartandstroke.ca](mailto:securities@heartandstroke.ca).** We will provide you with the account number and are happy to assist you with making your donation.

### Step 2:

**Complete all sections of the securities transfer form.** Please complete the Donor Information section, including your daytime phone number with area code. Your advisor/broker will help provide the information you need.

### Step 3:

**Email a copy of the completed transfer form to the Securities Administrator via email at [securities@heartandstroke.ca](mailto:securities@heartandstroke.ca).** Securities are transferred into our account without your name. We want to provide you with an accurate tax receipt in a timely manner and provide appropriate recognition to honour your generous gift. It is important for us to receive your name and address details via the completed transfer form.

### Step 4:

**Email the completed transfer form to your broker or investment advisor.** Your broker or investment advisor is responsible for initiating the transfer.

### Additional information:

Securities, shares and stocks are considered legally transferred only when our custodial agent RBC Dominion Securities confirms delivery. Your receipt is valued based on the closing price on the day when the shares are legally transferred to Heart & Stroke's account. Heart & Stroke's policy is to sell the shares as soon as possible after they have been received.

### For more information, contact:

Securities Administrator  
403-351-7051  
[securities@heartandstroke.ca](mailto:securities@heartandstroke.ca)

# Securities Transfer Form

## From Donor to Broker

### Donor Information (required for tax receipt)

Your receipt is valued based on the closing price on the day when the shares are legally transferred to Heart & Stroke's account.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone Home: \_\_\_\_\_ Email: \_\_\_\_\_

Work: \_\_\_\_\_

Cell: \_\_\_\_\_

### Broker Information

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ 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

**Attn: Dave Campeau**  
Ph: 604-257-7356  
Fax: 604-235-9950  
david.campeau@rbc.com

Account #: \_\_\_\_\_  
Please contact the Securities  
Administrator for the Account #  
403-351-7051  
securities@heartandstroke.ca

Please email a copy of the completed form before proceeding with your securities transfer to:

**securities@heartandstroke.ca**

If you have any questions, please contact:

**Securities Administrator**

403-351-7051

securities@heartandstroke.ca

**NOTE:** The Heart & Stroke office will be closed from December 25, 2025 to January 1, 2026.

Donors are encouraged to make their Gift of Securities by December 15, 2025. All Gifts of Securities **received** by December 31, 2025 will receive a charitable tax receipt. Given the volume of gifts and our holiday closure, some donors may receive their charitable tax receipts in January 2026.



Heart and Stroke Foundation of Canada — Charitable Registration #: 10684 6942 RR0001

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.

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