



Heart
&Stroke™

A lifesaving gift, a legacy of hope

Making a gift of securities

A step-by-step guide

Step 1:

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 2:

Email a copy of the completed transfer form to the Securities Administrator via email at 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 3:

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

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

Security Name # of units/Shares CUSIP# / symbol

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 #: 833-00831-17

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

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, 2026 to January 1, 2027.

Donors are encouraged to make their Gift of Securities by December 15, 2026. All Gifts of Securities **received** by December 31, 2026 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 2027.



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.

© Heart and Stroke Foundation of Canada, 2026. The heart and / icon and the Heart&Stroke word mark are trademarks of Heart and Stroke Foundation of Canada.