

Gift of Stocks & Securities Donation Form Guidelines and Instructions

Thank you for choosing Hospice Niagara as the beneficiary of your generosity. Your gift assists us in fulfilling our charitable mission to provide compassionate end-of-life care, at no-cost, to individuals in Niagara with life-limiting progressive illnesses and support to their caregivers and families.

There are just 3 easy steps to donate stocks or securities to Hospice Niagara:

Step 1:

Please complete all sections of the stocks/securities donation form.

For privacy reasons, your broker cannot disclose your name to us, so we ask you to please complete the Donor Information section of the form to advise us of your plan to make a donation of stocks or securities.

Your advisor/broker will provide us with your CUISP number which serves as a transaction number in order to track your transfer.

Step 2:

Fax, deliver or send a copy of your completed donation form to Hospice Niagara, and phone:

Alicia Merry, Director of Marketing, Communications and Fund Development

403 Ontario Street, Unit 2

St. Catharines, Ontario, L2N 1L5

E-mail: amerry@hospiceniagara.ca

Tel #: 905-984-8766 ext. 230

Hospice Niagara Charitable Registration #: 899716294RR0001

Fax #: 905-984-8242

This step is important because securities are transferred into Hospice Niagara's investment account anonymously, without your name listed. Notifying Hospice Niagara will help ensure that you receive your official receipt for income tax purposes and to make Hospice Niagara aware of your intention to donate stocks or securities.

Step 3:

Fax, deliver or send your completed donation form to:

Your broker/investment advisor who is responsible for initiating the actual transfer of securities.

Note:

Stocks/securities are considered legally transferred only when Hospice Niagara's custodial agent confirms delivery.

Your charitable tax receipt will be valued based on the price on the close of the day when the stocks/securities are legally transferred to:

Hospice Niagara's custodial agent:

RBC Dominion Securities Inc., Cooper Wealth Management

Thank you - please fill-in the Hospice Niagara Stocks & Securities Donation Form

Stocks & Securities Donation FORM for DONORS

Donor Stock & Securities Form to initiate donation of stocks or securities to Hospice Niagara
This form will provide Hospice Niagara with information necessary for issuing a charitable tax receipt and will ensure Hospice Niagara is aware of your intention to donate stocks/securities.

☐ I would like my gift dedicated *In Memory or In Honour of:* _____

Your Name: _____

Address: _____

City: _____ **Prov:** _____ **PC:** _____

Phone: _____ **Cell:** _____ **E-mail:** _____

Donor's Broker information

Company Name: _____

Contact Name: _____

Address: _____ **City:** _____

Prov: _____ **PC:** _____ **Phone:** _____ **E-mail:** _____

Transfer Securities from my account: **Account #:** _____

Securities to be donated:

Security/Stock Name	# of units	CUSIP # (Your broker knows this #)	Intended date of transfer
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Security/Stock Name	# of units	CUSIP # (Your broker knows this #)	Intended date of transfer
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The stock will be valued for your charitable receipt at the closing price on the day it is received by Hospice Niagara's brokerage account.

Securities Donation Authorization -- from Donor to Broker

I authorize Hospice Niagara, or its agent, to contact my broker for the purposes of concluding this transaction.

Donor Signature: _____ **Date:** _____

HOSPICE NIAGARA'S BROKER information & contact details for *your* broker:

RBC Dominion Securities Inc., Cooper Wealth Management

306-63 Church Street, St. Catharines, Ontario, L2R 3C4

Account Name: Hospice Niagara **Account Number:** 571-35363-1-5

CUID #: DOMA **FINS #:** T002 **DTC #:** 5002

Contact at Cooper Wealth Management: **Karen Charlesworth**, Associate

Telephone: 905-988-5882

FAX: 905-988-5889

e-mail: karen.charlesworth@rbc.com

Please email this completed form to amerry@hospiceniagara.ca AND submit a copy to your broker.

403 Ontario Street, Unit 2, St. Catharines, ON L2N 1L5

T: 905-984-8766 | Fax: 905-984-8242

info@hospiceniagara.ca | hospiceniagara.ca | Charitable Registration#: 89971 6294 RR0001

