

# AUTHORIZATION TO BROKER SECURITIES TRANSFER



Complete this authorization and provide it to your Broker who will initiate the transfer. Email a PDF or JPG copy to: [accounting@markdalehospitalfoundation.com](mailto:accounting@markdalehospitalfoundation.com) prior to the transfer so we can track your gift and provide your charitable receipt.

## A. DONOR INFORMATION:

-----

Name \_\_\_\_\_ Phone \_\_\_\_\_

-----

Address \_\_\_\_\_ City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

-----

\_\_\_\_\_ Email \_\_\_\_\_

-----

Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

## B. BROKER INFORMATION:

-----

Broker Name \_\_\_\_\_ Financial Institution \_\_\_\_\_

-----

Phone \_\_\_\_\_ Email \_\_\_\_\_ Account # (optional) \_\_\_\_\_

## C. DESCRIPTION OF SECURITIES TO BE DONATED:

-----

Number of Shares/Units \_\_\_\_\_ Name of Security \_\_\_\_\_

-----

CUSIP # \_\_\_\_\_ Expected Date of Transfer \_\_\_\_\_

Use my gift wherever the need is greatest.  Other designation: \_\_\_\_\_

## D. MARKDALE HOSPITAL FOUNDATION ACCOUNT INFORMATION:

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T009	NTDT	5043	9185
Receiving Institution: BMO Nesbitt Burns Inc.		For: Markdale Hospital Foundation - Account: 37016380-11		

Donor inquiries: Reuben McCallum 519-986-3040 x6178 [rmccallum@markdalehospitalfoundation.com](mailto:rmccallum@markdalehospitalfoundation.com)  
 Broker inquiries: Samia Beg 416-359-4024 [samia.beg@nbpcd.com](mailto:samia.beg@nbpcd.com)



## HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain this "Authorization to Broker" by calling 519-986-3040 x6178 or downloading it from [www.markdalehospitalfoundation.com](http://www.markdalehospitalfoundation.com). This is your instruction to your broker to transfer securities "in kind" to the Foundation. If you use a self-service brokerage such as BMO Investorline or Scotia itrade, **please contact the Foundation for assistance.**
2. Complete all sections of the form, especially the CUSIP # (provided by your broker/advisor and acts like a transaction number). For privacy reasons, your broker may not disclose your name to us, so please complete the Donor/Client information and include a daytime phone number.
3. Provide the completed form to your broker/advisor who will initiate and be responsible for the transfer.
4. **Please notify Markdale Hospital Foundation** by returning a copy to the Foundation either in person, or by emailing a PDF or JPG. This will ensure you receive our thanks, recognition and your official receipt in a timely manner. Copies can be emailed to [accounting@markdalehospitalfoundation.com](mailto:accounting@markdalehospitalfoundation.com).

## ADDITIONAL INFORMATION:

Your receipt will be based on the closing price of the securities on the day they are received into the Foundation's brokerage account. All securities are redeemed as soon as possible after receiving them. If you plan to donate securities that are thinly traded, volatile or not easily liquidated, please call us before initiating the transfer. All gifts are subject to review, approval and acceptance by the Foundation.

## ABOUT BRIGHTSHORES MARKDALE HOSPITAL FOUNDATION:

Markdale Hospital Foundation raises funds to support health care in our community. Our priority is the purchase of essential medical equipment at Brightshores Health System Markdale Hospital.

The Foundation is governed by a local, volunteer Board of Directors. Our community proudly celebrates the completion of its new hospital, but the need for new and updated medical equipment is ongoing as services expand and technology advances at a rapid pace.

While the Province funds hospital operations, very little funding is provided for new and replacement equipment. Community support is essential to keep our hospital well equipped, so that residents and visitors continue to receive expert, compassionate care close to home.

### PLEASE CONTACT:

Reuben McCallum, Executive Director  
519-986-3040 x6178  
[rmccallum@markdalehospitalfoundation.com](mailto:rmccallum@markdalehospitalfoundation.com)

Willard VanderPloeg, Charitable Giving Advisor  
519-376-2121 x2736 or 519-270-9177  
[wvanderploeg@brightshores.ca](mailto:wvanderploeg@brightshores.ca)

[www.markdalehospitalfoundation.com](http://www.markdalehospitalfoundation.com)



220 Toronto St. South, Box 406  
Markdale, ON N0C 1H0  
Charitable # 89063 4025 RR0001