

Instructions to Donate Publicly Traded Securities

Thank you for your generous gift to the St. Francis Valley Healthcare Foundation. Please ensure you fill out this form and forward a copy to us **prior to transferring** securities to our account.

Step 1: Fill Out Form

We require one form for each publicly traded security. This can be filled out by your broker, but it will require the donor's signature.

Step 2: Share with your Broker

Share a copy of the signed form with your broker. This allows them to arrange the transfer of shares.

Step 3: Submit to Foundation

Send a copy of the signed form to the Foundation. This can be done by you or your broker. Submit to:

Erin Gienow, Executive Director

7 St. Francis Memorial Drive
PO Box 129
Barry's Bay, ON K0J 1B0
Email: erin@sfvhfoundation.com
Phone: 613-756-3045 ext. 333

**St. Francis Valley Healthcare
Foundation's Broker Information**
(Receiving Broker)

BMO Investor line

Account #: 22561089

(CUID: NTD / DTC: 5043)

For BMO Investorline inquiries:
1-888-776-6886

Donor Information

Name

Address

City

Province

Postal Code

Email

Phone #

Donor Broker Information

Advisor's Name

Phone #

Email

Financial Institution

Name on Account

Account #

Description of Your Securities to be Donated

Name of Security

CUSIP#

Number of Shares

Expected date of transfer

Gift Details

Please designate my gift to the area of greatest need

Other

Pledge payment

Donor Signature _____

Date

A tax receipt will be issued for income tax purposes. The value of the receipt will be determined by the Fair Market Value of the securities on the date the securities are received in the Foundation's brokerage account, based on the market closing price for the day.