

# IMPROVING HEALTHCARE WITH YOUR GIFT

## GIFTS OF PUBLICLY LISTED SECURITIES

### AUTHORIZATION TO BROKER

Please complete this authorization for your Broker. **Email a PDF or JPG copy to: [mhfoundation@gbhs.on.ca](mailto:mhfoundation@gbhs.on.ca)** prior to the transfer so we can track your donation and send your charitable receipt.

#### A. DONOR INFORMATION:

Name		Phone		
Address	City	Province	Postal Code	
Signature (required)		Email		
		Date		

#### B. BROKER INFORMATION:

Broker Name	Financial Institution
Business Phone	Email

#### 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. ACCOUNT INFORMATION FOR MEAFORD HOSPITAL FOUNDATION:

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T009	NTDT	5043	9185

Receiving Institution: BMO Nesbitt Burns Inc. For: Meaford Hospital Foundation - Account: 630-01048-14

**Donor inquiries:** 519-538-1311 x4208 [mhfoundation@gbhs.on.ca](mailto:mhfoundation@gbhs.on.ca)  
**Broker inquiries:** Kelly Haefling 519-376-6778 [kelly.haefling@nbpcd.com](mailto:kelly.haefling@nbpcd.com)

## HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain a copy of this “Donor Authorization to Broker” from the Foundation by calling 519-538-1311 ext. 4208. This is your instruction to your broker to transfer securities “in kind” to the Foundation.
2. Complete all sections of this form, especially the CUSIP # (provided by your broker/ investment advisor and acts like a transaction number in case the transfer needs to be tracked). For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor/Client Information, including your daytime phone number.
3. Provide your completed authorization to your broker/investment advisor who will initiate and be responsible for the transfer.
4. Please notify the Meaford Hospital Foundation by forwarding a copy of this form to the Foundation either in person, or by emailing a PDF or JPG. Notifying us will ensure you receive our thanks, appropriate recognition and your official receipt for income tax purposes in a timely manner. Copies should be emailed to [mhfoundation@gbhs.on.ca](mailto:mhfoundation@gbhs.on.ca).

## ADDITIONAL INFORMATION:

Your receipt will be valued based on the closing price of the securities on the day they are received into the Foundation’s brokerage account. The Meaford Hospital Foundation’s policy is that all securities donated will be sold as soon as possible after they have been received.

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 THE MEAFORD HOSPITAL FOUNDATION:

The Meaford Hospital Foundation was established to raise, receive and manage money for the purpose of purchasing capital equipment and building improvements at Meaford Hospital and Owen Sound Regional Hospital. This role is critical to our hospitals’ viability since the government provides almost no funding for equipment. The Foundation contributes between \$300,000 and \$400,000 per year for medical equipment. It is governed by an elected Board of Directors, all of whom are community volunteers.

### FOR LEGACY GIVING INQUIRIES, CONTACT:

Willard VanderPloeg, Charitable Giving Advisor  
519-376-2121 ext. 2736  
[wvanderploeg@gbhs.on.ca](mailto:wvanderploeg@gbhs.on.ca)



**The Meaford Hospital Foundation Inc.,**  
229 Nelson Street West, Meaford ON, N4L 1A3  
519-538-1311 x4208  
[www.mhfoundation.ca](http://www.mhfoundation.ca)

Charitable Registration #11903 6408 RR0001

*This information provides a brief overview on planning a gift to The Meaford Hospital Foundation. It is general in nature and subject to change according to individual circumstances. You should always consult your own professional advisors for detailed information tailored to your own circumstances and to confirm applicable tax benefits.*