

# Transfer of Securities Form

In order to make your gift, please complete this form with your broker. If you do not have a broker, complete the form and **send it directly to your delivering institution, Waterloo Regional Health Network Foundation, and The RaeLipskie Partnership.**

## Donor information

Name: .....

Address: .....

City, Province & Postal Code: .....

Phone #: .....

Email: .....

## Broker/delivering custodian information (Broker/DC to complete):

Name of Broker: .....

Phone #: .....

Name of Firm: .....

FINS#: .....

Broker Fax#: ..... Broker Email: .....

Client Account #: .....

I authorize the transfer in kind of the following securities to NBIN Inc. (FINS# T080) to be credited to Account: 6C8H5LA DTC: 5008 CUID Code: NBCS Name: Waterloo Regional Health Network Foundation.

Description of Securities: .....

Name of Security: .....

CUSIP/ISIN: .....

Number of shares/units to transfer: .....

Estimated Market Value of Securities: .....

Donor Signature: ..... Date: .....

I would like to my gift to be used for:

Priority/Greatest Needs      Other .....  
(please specify)

Please have a WRHN Foundation staff member contact me to discuss the allocation of my gift.

Thank you for your support of WRHN Foundation  
Charitable Registration Number: 88918 0394 RR 0001



# WRHN Foundation Gift of Securities Transfer Form

## Donation of Publicly Traded Securities

Donating a gift of securities is one way to support Waterloo Regional Health Network Foundation (WRHNF). In some instances, Canadians who donate appreciated securities (including stocks, bonds and mutual funds) directly to a registered charity may eliminate or reduce capital gains tax on the investment. We highly recommend that you speak with a tax professional to learn more about tax rules and their implications and to discuss your plans and options.

Your investment builds a connected care network across three sites.



## Instructions for donating a gift of securities:

1. Complete the Transfer of Securities Form (see other page) with your broker and send it to both The RaeLipskie Partnership, Private Wealth Management and the WRHN Foundation by mail or email:

**The RaeLipskie Partnership, Private Wealth Management**

Attn: Stacey Crosby  
Email: [stacey@raelipskie.com](mailto:stacey@raelipskie.com)  
Tel: 1-888-578-7542 ext. 243 Fax: 519-578-7269  
Dealer #: T080 DTC#: 5008  
CUID: NBCS

**Waterloo Regional Health Network Foundation**

Attn: Admin Team  
Email: [info@wrhnf.ca](mailto:info@wrhnf.ca)  
Tel: 519-749-6797  
Medical Centre 2  
435 The Boardwalk, Suite 300  
Waterloo, ON, N2T 0C2

2. Instruct your broker/delivering custodian to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization. You may also wish to follow up with your broker to help ensure your instructions are carried out as specified.
3. Upon receipt of the transferred securities to the WRHNF brokerage account, we will issue a charitable tax receipt based on the closing market value of the shares on the date they are received into our brokerage account.

