

# AUTHORIZATION TO BROKER SECURITIES TRANSFER



Please complete this authorization/instruction and provide it to your Broker. Email a PDF or JPG copy to: [tmurray@brightshores.ca](mailto:tmurray@brightshores.ca) prior to the transfer so we can track your donation and send your charitable receipt.

## A. DONOR INFORMATION:

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

## B. BROKER INFORMATION:

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Broker Name \_\_\_\_\_ Financial Institution \_\_\_\_\_  
-----  
Phone \_\_\_\_\_ Email \_\_\_\_\_ Account # (optional) \_\_\_\_\_

## C. DESCRIPTION OF SECURITIES TO BE DONATED:

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Number of Shares/Units \_\_\_\_\_ Name of Security \_\_\_\_\_  
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CUSIP # \_\_\_\_\_ Expected Date of Transfer \_\_\_\_\_

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

## D. ACCOUNT INFO FOR SAUGEEN SHORES HOSPITAL FOUNDATION:

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T079	WGDB	5030	9479
Receiving Institution: CIBC Investor's Edge 199 Bay St. Commerce Court West, B2 Level, Toronto, ON M5L 1G9		For: Saugeen Shores Hospital Foundation Account # 575-11870		

Donor inquiries: Tracy Murray 519-797-3230 x3230 or [tmurray@brightshores.ca](mailto:tmurray@brightshores.ca)  
Broker inquiries: CIBC Investor's Edge 800-567-3343 or [mailbox.externaltransfersupport@cibc.com](mailto:mailbox.externaltransfersupport@cibc.com)



## HOW TO MAKE YOUR GIFT OF SECURITIES:

1. Obtain a copy of this "Authorization to Broker" from the Foundation by calling 519-797-3230 x3230 or downloading it from [www.saugeenshoresfoundation.ca/securities](http://www.saugeenshoresfoundation.ca/securities). This is your instruction to your broker to transfer securities "in kind" to the Foundation. **If you have an account with a self-service brokerage such as BMO Investorline or Scotia iTrade, please contact the Foundation for assistance.**
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 may not disclose your name to us, so please provide contact info and a daytime phone number.
3. Give your completed authorization to your broker/investment advisor, who will initiate the transfer.
4. Forward a copy of this form to the Foundation either in person, or by [emailing](#) a PDF or JPG. This will ensure you receive our thanks, appropriate recognition and your receipt in a timely manner.

## ADDITIONAL INFORMATION:

Receipts are based on the closing price of the securities on the day they are received into our account. 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 SAUGEEN SHORES HOSPITAL FOUNDATION:

Our Mission: Inspiring and empowering our communities to invest in advancing healthcare within the Brightshores Health System.

We are one of five Foundations that support Brightshores Health System hospitals in Lion's Head, Markdale, Meaford, Owen Sound, Wiarton and Saugeen Shores. Funds raised are used to purchase medical equipment and support other projects such as facility improvements, medical research and clinical staff education.

No government funding is provided for new and replacement equipment. Donor support is key to ensuring that our Hospital continues to thrive!

### PLEASE CONTACT:

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