



## *Securities Donation Form*

Complete the requested information on the form. Provide a copy of the form to BTHC Foundation **and** to your investment advisor, who will initiate the transfer of your securities to the Foundation's brokerage account.

**To be completed by Donor**

Name: \_\_\_\_\_ Daytime telephone: \_\_\_\_\_

Address: \_\_\_\_\_ Email Address: \_\_\_\_\_

Investment Advisor: \_\_\_\_\_ Advisor's phone number: \_\_\_\_\_

Advisor's delivering institution: \_\_\_\_\_

Institution Address: \_\_\_\_\_

Account # at delivering institution: \_\_\_\_\_

Name of security: \_\_\_\_\_

# of shares / units transferred: \_\_\_\_\_ Approx. value of each share / unit: \$ \_\_\_\_\_

Approx. total amount of donation: \$ \_\_\_\_\_ Date of transfer: \_\_\_\_\_

This letter serves as my authorization to the Investment Advisor named above to release the securities noted above to the account of Boundary Trails Health Centre Foundation. I understand that I will receive a tax receipt from Boundary Trails Health Centre Foundation for the closing price of these securities on the date the transfer is received into Boundary Trails Health Centre Foundation's brokerage account. These securities have been donated to Boundary Trails Health Centre Foundation without restriction and can be sold by Boundary Trails Health Centre Foundation at any time.

Signature of donor: \_\_\_\_\_ Date: \_\_\_\_\_

**Boundary Trails Health Centre Foundation brokerage account information:**

MD Management Limited

Account #: 5993795NT (DTC: 5008) (CUID: MDML) (Dealer #: 9871)

Broker: Daniel Louer, CFP

Email: daniel.louer@md.ca

Phone: 204.783.2463, ext. 5447

Fax: 204.772.1960

If you have any further questions, please contact us directly at:

Shannon Samatte-Folkett, Executive Director

Phone: 204.331.8808 ext 2

Email: office@bthcfoundation.com