

**INSTRUCTIONS FOR MAKING A GIFT OF PUBLICLY-TRADED SECURITIES TO  
CALGARY HEALTH FOUNDATION**

**STEP 1** Download/Complete the Securities Transfer Form including the CUSIP# of the assets being transferred (the gift) and send to your broker via fax or email to begin transfer process.

**STEP 2** Also fax or preferably email the completed form to the Calgary Health Foundation and their Broker notifying them of the pending gift.

**Blair Nicholls, Calgary Health Foundation**

Fax: 403.943.0620

Email: [fundraising@calgaryhealthfoundation.ca](mailto:fundraising@calgaryhealthfoundation.ca)**Pamela Dixon, Associate, RBC Dominion Securities**

Fax: 403.299.7100

Email: [pamela.dixon@rbc.com](mailto:pamela.dixon@rbc.com)

Calgary Health Foundation (CHF) is the registered charity for Alberta Health Services – Calgary Zone (Charitable Registration (B.N.) 89383 4697 RR0001). The donated securities are normally sold by CHF, and the net proceeds from the sale will be available for the gift designation as described on the Securities Transfer Form.

Other than possible income tax benefits and any recognition that CHF may provide at its sole discretion in accordance with its practice of acknowledging gifts of this nature, the Donor confirms that neither the Donor, nor any person related to the Donor, will receive a benefit or advantage of any kind, now or in the future as a result of the Donor making the gift. To assist with the Foundation's costs, including processing, receipting, investment management, stewardship and granting, 5% of the gift will be allocated to CHF.

Electronic delivery can take 2-10 days depending on the broker, though 2 days is typical. Mutual funds can take 10-30 days.

Once the securities transfer has completed and confirmed, CHF will issue a charitable tax receipt to the donor. For valuation purposes, the value of the gift shall be the closing market price of the securities comprising the gift at the time the gift is received by CHF.

**If you have questions or need more information, please contact:****Blair Nicholls**

Calgary Health Foundation

403.943.0315 or 403.862.4202

[fundraising@calgaryhealthfoundation.ca](mailto:fundraising@calgaryhealthfoundation.ca) or[blair.nicholls@calgaryhealthfoundation.ca](mailto:blair.nicholls@calgaryhealthfoundation.ca)

## SECURITIES TRANSFER FORM

### Donor Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_ Foundation Contact \_\_\_\_\_

### Description of Securities - Equities/Mutual Funds/Bonds

This form will confirm my intention to donate the following securities to Calgary Health Foundation:

Security Description \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN/FUND CODE \_\_\_\_\_

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### Broker

Name of Firm \_\_\_\_\_ FINS# \_\_\_\_\_ Fax \_\_\_\_\_

Name of Broker \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

Account Name \_\_\_\_\_ Client Account Number \_\_\_\_\_

### Gift Designation

Highest Priority Needs of CHF (default) or

Specific Designation: \_\_\_\_\_

### Donor Authorization

I wish to make a charitable gift consisting of listed securities to the Calgary Health Foundation (B.N.) 89383 4697 RR0001. Further to this, please accept this form as my authorization for you to transfer in-kind, the above listed securities from my brokerage account to the Calgary Health Foundation custody account held at RBC Dominion Securities (trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from the Calgary Health Foundation. The amount of the receipt will be based on the value as of the close of trading on the date they are received by the Calgary Health Foundation in their custody account.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**RBC Dominion Securities ACCOUNT:** 384-89001-18

**FINS:** T002 **CUID:** DOMA **DTC:** 5002