



1800 8th Street East
Owen Sound, ON N4K 6M9
519-372-3925 519-372-3950
www.oshfoundation.ca

Gifts of Publicly Listed Securities

Donor Authorization to Broker

Please complete this authorization for your Broker. Email a PDF or JPG copy: wvanderploeg@oshfoundation.ca or fax: 519-372-3950 prior to the transfer so we can track your donation and send your charitable receipt.

A. Donor Information:

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

B. Broker Information:

Broker Name Financial Institution
Daytime 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 Owen Sound Regional Hospital Foundation:

Table with 5 columns: Transfer to, FINS, CUID/DCS, DTC (US), Dealer (Mutual Funds). Includes receiving institution RBC Direct Investing and account number 68952422 1-9.

Donor inquiries: Amy McKinnon 519-372-3925 or amckinnon@oshfoundation.ca
Broker inquiries: RBC Direct Investing 800-769-2560

How to make your Gift of Securities to the Owen Sound Regional Hospital Foundation:

Following these four steps will help you quickly and easily donate stocks, bonds or mutual funds to the Owen Sound Regional Hospital Foundation.

1. **Obtain a copy of this “Donor Authorization to Broker”** from the Foundation by calling 519-372-3925 or downloading it from www.oshfoundation.ca. This is your instruction to your broker to transfer securities “in kind” to the Foundation.
2. **Complete all sections of the authorization 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 Foundation** by returning a copy of the completed authorization form to the Foundation either in person, by emailing a PDF or JPG or by fax. 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 wvanderploeg@oshfoundation.ca or faxed to 519-372-3950.

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 at RBC Direct Investing. The Owen Sound Regional 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 Foundation:

The Owen Sound Regional Hospital Foundation is a charitable organization that raises funds to support the purchase of medical equipment for Grey Bruce Health Services - Owen Sound Regional Hospital. Our charitable registration number is **BN 124052507 RR0001**.

Questions?

If you have questions about giving through your will, please contact the Foundation office. All discussions are confidential.

Owen Sound Regional Hospital Foundation - Willard VanderPloeg, Development Officer
Phone: 519-372-3925 Fax: 519-372-3950 E-mail: wvanderploeg@oshfoundation.ca

This information provides a brief overview on planning a gift to the Owen Sound Regional Hospital Foundation. The information is general in nature and is 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.