

## DONOR AUTHORIZATION TO BROKER



Complete this authorization for your Broker. **Email a PDF or JPG copy to:** [accounting@cghsfoundation.com](mailto:accounting@cghsfoundation.com) prior to the transfer so we can track your gift and provide your charitable receipt.

### A. Donor:

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

### B. Broker:

Name	Financial Institution
Business 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. Centre Grey Health Services Foundation Account Information:

**Donor inquiries:** Darlene Lamberti 519-986-3040 x6178 [dlamberti@cghsfoundation.com](mailto:dlamberti@cghsfoundation.com)  
**Broker inquiries:** Samia Beg 416-359-4024 [samia.beg@nbpcd.com](mailto:samia.beg@nbpcd.com)

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T009	NTDT	5043	9185
Receiving Institution: BMO Nesbitt Burns Inc.		For: Centre Grey Health Services Foundation - Account: 37016380-11		

## HOW TO MAKE YOUR GIFT OF SECURITIES

1. Obtain this “Donor Authorization to Broker” by calling 519-986-3040 ext. 6178 or downloading it from [www.cghsfoundation.com](http://www.cghsfoundation.com). This is your instruction to your broker to transfer securities “in kind” to the Foundation. If you use a self-service brokerage such as BMO Investorline or Scotia itrade, please contact the Foundation for assistance.
2. Complete all sections of the form, especially the CUSIP # (provided by your broker/advisor and acts like a transaction number). 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 the completed form to your broker/advisor who will initiate and be responsible for the transfer.
4. **Please notify Centre Grey Health Services Foundation** by returning 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 official receipt for income tax purposes in a timely manner. Copies can be emailed to [accounting@cghsfoundation.com](mailto:accounting@cghsfoundation.com) or [dlamberti@gbhs.on.ca](mailto:dlamberti@gbhs.on.ca)

## ADDITIONAL INFORMATION

Your receipt will be based on the closing price of the securities on the day they are received into the Foundation’s brokerage account. All securities are redeemed as soon as possible after receiving them. 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 CENTRE GREY HEALTH SERVICES FOUNDATION

Centre Grey Health Services Foundation raises funds to support health care in our community. Our priority is the purchase of medical equipment at Grey Bruce Health Services Markdale.

The Foundation is governed by a volunteer Board of Directors drawn from the area. This includes Grey Highlands and portions of Chatsworth, Southgate, and West Grey. There is a constant need for new and updated medical equipment at our hospital. In most cases, the Province doesn’t provide funding for such equipment. Our mission is to make sure that residents and visitors to Centre Grey will continue to have access to the best medical technology.

### PLEASE CONTACT:

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**Centre Grey Health Services Foundation**  
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[www.cghsfoundation.com](http://www.cghsfoundation.com)



**CENTRE GREY  
HEALTH SERVICES  
FOUNDATION**

Charitable Registration #: BN89063 4025 RR0001

*This information provides a brief overview on planning a gift to Centre Grey Health Services Foundation. It is general in nature and 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.*