



# Gift of Publicly Traded Securities

The North Bay Regional Health Centre Foundation greatly appreciates your investment in providing exceptional healthcare, close to home. This form outlines the process to make your donation as seamless as possible.

## Step One: Fill Out Form

We require one form for each publicly traded security. This can be filled out by your broker, but it requires the donor's signature.

## Step Two: Share with Your Broker

Share a copy of the signed form with your broker. This allows them to arrange the transfer of shares.

## Step Three: Submit to Foundation

Send a copy of the signed form to the Foundation, allowing us to track your generous gift and inform our broker. This can be done by you or your broker.

## DONOR INFORMATION

Full Name :

Address :

City and Prov :

Post Code :

Email:

Phone :

## BROKER INFORMATION (Delivering Broker)

Institution:

Address :

Advisor's Name :

Account No.:

Email:

Phone :

## DESCRIPTION OF SECURITIES

Name of Security:

CUSIP/ISIN :

Est # of Shares:

I would like my gift to be designated where the need is greatest.

Specific designation:

\_\_\_\_\_  
Donor Signature (required)

\_\_\_\_\_  
Day/Month/Year

Please be advised that a charitable receipt will be issued for the closing market value of the day the shares are received by the Foundation.

## RECEIVING INSTITUTION

**Dealer:** 9265, **FINS NO.:** T007, **CUID:** GIST **Account No.:** 17B0L3A

North Bay Regional Health Centre Foundation **Charitable No.:** 887731123RR0001

**NORTH BAY REGIONAL HEALTH CENTRE FOUNDATION**

James Loeffen, Finance and Administration Officer

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