



# Gift of Securities

## Transfer Authorization Form

### 1. Donor Information

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

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

\_\_\_\_\_

### 2. Donor's Broker Information

Institution Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Name of Security: \_\_\_\_\_

# of Units: \_\_\_\_\_

Account No.: \_\_\_\_\_

Approx. Value of Each Unit: \$ \_\_\_\_\_

Approx. Total Value of Donation: \$ \_\_\_\_\_

Date of Transfer to LHSF's Account: \_\_\_\_\_

### 3. London Health Sciences Foundation Brokerage Account at RBC Dominion Securities

Contact Name: Bill McConnell / Laurie Au, RBC Dominion Securities

Branch: 1900 -148 Fullarton Street, London, ON N6A 5P3

Phone: 519.675.6877 Fax: 519.675.2020

Account No: \_\_\_\_\_ CDS Participant (FINS) #: \_\_\_\_\_

Dealer No. (mutual fund transfers): \_\_\_\_\_ Rep Code: \_\_\_\_\_

DTC #: \_\_\_\_\_ CUID: \_\_\_\_\_

### 4. Donor Authorization

\_\_\_\_\_

Donor Signature

Date

\_\_\_\_\_

Donor Signature

Date

## Instructions

1. **Complete this Gift of Securities Transfer Authorization Form.** Your broker can assist you.
2. **Contact Us** – your broker will advise us of the securities donation and we'll provide our broker's information and clarify any questions. **Nicole Gowing: 519.685.8500 ext. 52961**
3. **Authorization** – simply sign to authorize the transfer of securities to London Health Sciences Foundation (LHSF). Your broker will initiate the transfer to our account.
4. **Fax** – have your broker fax the information to: LHSF: Jon Harris at 519.685.8452 and RBC: Laurie Au at 519.675.2020
5. **Confirmation** – Once the security is received in our account, LHSF will confirm with you. The value of the charitable receipt is determined by the closing price on the day LHSF receives the securities into our account.

*Due to the cost of processing securities trades, we respectfully request a minimum Fair Market Value donation of \$1,000.*