

## Gift of Stocks & Securities Donation Form Guidelines and Instructions

Thank you for choosing Hospice Niagara as the beneficiary of your generosity. Your gift assists us in fulfilling our charitable mission to provide compassionate end-of-life care, at no-cost, to individuals in Niagara with life-limiting progressive illnesses and support to their caregivers and families.

**There are just 3 easy steps to donate stocks or securities to Hospice Niagara:**

### Step 1:

**Please complete all sections of the stocks/securities donation form.**

For privacy reasons, your broker cannot disclose your name to us, so we ask you to please complete the Donor Information section of the form to advise us of your plan to make a donation of stocks or securities.

Your advisor/broker will provide us with your CUISP number which serves as a transaction number in order to track your transfer.

### Step 2:

**Fax, deliver or send a copy of your completed donation form to Hospice Niagara, and phone:**

#### **Pamela Mackie**

403 Ontario Street, Unit 2

St. Catharines, Ontario, L2N 1L5

E-mail: [pmackie@hospiceniagara.ca](mailto:pmackie@hospiceniagara.ca) **Tel #: 905-984-8766 ext. 223 Fax #: 905-984-8242**

Hospice Niagara Charitable Registration #: 899716294RR0001

This step is important because securities are transferred into Hospice Niagara's investment account anonymously, without your name listed. Notifying Hospice Niagara will help ensure that you receive your official receipt for income tax purposes and to make Hospice Niagara aware of your intention to donate stocks or securities.

### Step 3:

**Fax, deliver or send your completed donation form to:**

Your broker/investment advisor who is responsible for initiating the actual transfer of securities.

#### **Note:**

Stocks/securities are considered legally transferred only when Hospice Niagara's custodial agent confirms delivery.

Your charitable tax receipt will be valued based on the price on the close of the day when the stocks/securities are legally transferred to:

**Hospice Niagara's custodial agent: RBC Dominion Securities Inc., Cooper Wealth Management**

### Serving Families in Niagara

Hospice Niagara - The Stabler Centre

403 Ontario Street, Unit 2

St. Catharines, ON L2N 1L5

F: 905-984-8242



Hospice Niagara - Welland Office

555 Prince Charles Drive

Welland, ON L3C 6B5

F: 905-735-1703

T: 905-984-8766 | [info@hospiceniagara.ca](mailto:info@hospiceniagara.ca) | [hospiceniagara.ca](http://hospiceniagara.ca) | Charitable Registration # 899716294RR0001

**We rely on donations to provide our programs and services.**

# Stocks & Securities Donation FORM for DONORS

## Donor Stock & Securities Form to initiate donation of stocks or securities to Hospice Niagara

This form will provide Hospice Niagara with information necessary for issuing a charitable tax receipt and will ensure Hospice Niagara is aware of your intention to donate stocks/securities.

I would like my gift dedicated *In Memory* or *In Honour* of: \_\_\_\_\_

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ PC: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Donor's Broker information

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

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

Address: \_\_\_\_\_ City: \_\_\_\_\_ Prov: \_\_\_\_\_ PC: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Transfer Securities from my account: Account #: \_\_\_\_\_

### Securities to be donated:

Security/Stock Name	# of units	CUSIP #	Intended date of transfer
_____	_____	_____	_____

(Your broker knows this #)

Security/Stock Name	# of units	CUSIP #	Intended date of transfer
_____	_____	_____	_____

(Your broker knows this #)

The stock will be valued for your charitable receipt at the closing price on the day it is received by Hospice Niagara's brokerage account.

### Securities Donation Authorization -- from Donor to Broker

I authorize Hospice Niagara, or its agent, to contact my broker for the purposes of concluding this transaction.

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

### HOSPICE NIAGARA'S BROKER information & contact details for *your* broker:

#### RBC Dominion Securities Inc., Cooper Wealth Management

400-63 Church Street, St. Catharines, Ontario, L2R 3C4

Account Name: Hospice Niagara Account Number: 571-35363-1-5

CUID #: DOMA FINS #: T002 DTC #: 5002

Contact at Cooper Wealth Management: Karen Charlesworth, Associate

Telephone: 905-988-5882 | FAX: 905-988-5889 | [karen.charlesworth@rbc.com](mailto:karen.charlesworth@rbc.com)

\*Please submit a copy of this completed form to Hospice Niagara AND your broker.

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