

## ■ Gift of Publicly Traded Securities

### Donor Authorization to Broker

Please complete this authorization for your Broker. Email a PDF or JPG copy: [tmurray@smhfoundation.ca](mailto:tmurray@smhfoundation.ca) or fax to 519-797-3247 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
Signature		Date	
Email			

#### 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 Saugeen Memorial Hospital Foundation:

Transfer to:	FINS	CUID/DCS	DTC (US)	Dealer (Mutual Funds)
	T079	WGDB	5030	9479

Receiving Institution: CIBC Investor's Edge  
CIBC Investor Services Inc. 3<sup>rd</sup> Floor, 800 Bay St. Toronto, ON M5S 3A9

For: SMH Foundation - Acct. #575-11870  
FAX: 514-876-7000

**Donor Inquiries:** Tracy Murray - 519-797-3230 ext. 3230 or [tmurray@smhfoundation.ca](mailto:tmurray@smhfoundation.ca)

**Broker inquiries:** CIBC Investor Services - GOW Processing Team - 800-567-3343

## How to make your Gift of Securities to Saugeen Memorial Hospital Foundation:

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

1. Obtain a copy of this “Donor Authorization to Broker” from the Foundation by calling 519-797-3230 x3230 or downloading it from [www.smhfoundation.ca](http://www.smhfoundation.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 this completed authorization form to the Foundation either in person or by emailing a PDF or JPG or fax to 519-797-3247. 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 [tmurray@smhfoundation.ca](mailto:tmurray@smhfoundation.ca)

### 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 CIBC Investor’s Edge. Saugeen Memorial 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.

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### About the Foundation:

Our mission is to raise and manage funds for equipment, facilities and staff development to ensure our community and visitors have access to the best possible hospital care.

The Saugeen Memorial Hospital Foundation is 1 of 5 foundations supporting Grey Bruce Health Services hospitals in Lion’s Head, Markdale, Meaford, Owen Sound, Wiarton and Southampton. Our fundraised dollars are used to purchase equipment for Southampton Hospital, plus a share - based on patient usage, for our regional hospital in Owen Sound.

Each year we raise approximately \$500,000 to help purchase high priority medical equipment. The Provincial Ministry of Health provides very little funding to hospitals for up-to-date technology and facilities. Therefore, funds must be raised with help from the community.

Should you choose to arrange a gift with the Foundation, you would be helping to ensure a higher standard of hospital care for everyone in Saugeen Shores.

***This makes your support critical.***

### For Legacy Giving Inquiries Please Contact:

**Tracy Murray, Executive Director**

519-797-3230 ext. 3230

[tmurray@smhfoundation.ca](mailto:tmurray@smhfoundation.ca)

**Willard VanderPloeg, Charitable Giving Advisor**

519-376-2121 ext. 2736

[wvanderploeg@smhfoundation.ca](mailto:wvanderploeg@smhfoundation.ca)

340 High Street, Southampton, ON N0H 2L0 Charitable Registration #88959 9825 RR0001

Visit [smhfoundation.ca](http://smhfoundation.ca) for further information about the Foundation.

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*This information provides a brief overview on planning a gift to Saugeen Memorial 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.*