

CARING FOR TOMORROW

SECURITIES TRANSFER



DONOR AUTHORIZATION TO BROKER:

Please complete this authorization for your Broker. Email a PDF or JPG copy: tmurray@brightshores.ca prior to the transfer so we can track your donation and send your charitable receipt.

A. DONOR INFORMATION:

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

B. BROKER INFORMATION:

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. ACCOUNT INFO 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 199 Bay St. Commerce Court West, B2 Level, Toronto, ON M5L 1G9			For: Saugeen Memorial Hospital Foundation Account # 575-11870	

Donor inquiries: Tracy Murray; 519-797-3230 x3230 or
Broker inquiries: CIBC Investor's Edge; 800-567-3343 or

tmurray@brightshores.ca
mailbox.externaltransfersupport@cibc.com

HOW TO MAKE YOUR GIFT OF SECURITIES:

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. This is your instruction to your broker to transfer securities “in kind” to the Foundation. **If you have an account with a self-service brokerage such as BMO Investorline or Scotia iTrade, please contact the Foundation for assistance.**
2. Complete all sections of this transfer 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 the transfer.
4. Forward a copy of this form to the Foundation either in person, by fax or by [emailing](#) a PDF or JPG. This will ensure you receive our thanks, appropriate recognition and your receipt in a timely manner.

ADDITIONAL INFORMATION:

Receipts are based on the closing price of the securities on the day they are received into our account. 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.

ABOUT SAUGEEN MEMORIAL HOSPITAL 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.

We are one of five Foundations that support Brightshores Health System hospitals in Owen Sound, Markdale, Meaford, Wiarton, Lion’s Head and Saugeen Shores. Funds raised are used to purchase medical equipment and support other projects such as facility improvements, medical research and clinical staff education.

Each year our goal is to raise nearly \$2 million to purchase items from Brightshores’ list of priority equipment needs. Very little government funding is provided to hospitals for new and replacement equipment.

Donor support is key to ensuring that our Hospital continues to thrive!

FOR ASSISTANCE, PLEASE CONTACT:

Willard VanderPloeg, Charitable Giving Advisor
519-376-2121 ext. 2736
wvanderploeg@brightshores.ca

Saugeen Memorial Hospital Foundation
340 High Street, Southampton, ON N0H 2L0
Charitable Registration #88959 9825 RR0001

Visit www.smhfoundation.ca/securities to learn more.



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