

# Planned Giving

*Leave a legacy to your community through your local hospital*

## Gifts of Securities

A donation of securities is a cost-effective opportunity to make a difference for Huntsville Hospital. Donating publicly traded securities eliminates the capital gains tax that becomes payable when selling securities on the market and in turn the proceeds are donated to Huntsville Hospital Foundation. Donating securities is a tax-effective way to make an outright gift during your lifetime or as part of a legacy gift.

1. To transfer securities electronically, please complete the attached form, *Charitable Donation of Securities In Kind* and deliver to your broker as well as the Huntsville Hospital Foundation. Unexpected and/or unidentifiable transfers may make it difficult for the Foundation to issue the appropriate tax receipt.
2. Your broker should contact and deliver the form and the securities to our agent, National Bank  
**Account of:** Huntsville District Memorial Hospital Foundation | **Account Number:** 6C4QBXA  
**Receiving Institution:** 5036  
**Contact:** Ajit Rekhy  
**Phone:** 416-542-2295 | **Email:** ajit.rekhy@nbc.ca
3. The Foundation will be advised once the securities have been transferred to the brokerage account and the closing bid value on the day the securities transfer form was signed and received. If the transfer form is not received on the date signed, then the date of the gift is the date the shares are received by National Bank into Huntsville Hospital Foundation account. *For end of year securities donations, please ensure your trades transaction is processed on the last business day prior to December 31st to ensure receipt in the current tax year.*
4. The Foundation will issue an official receipt to you, for income tax purposes, for the value as determined by National Bank. The value of the donation will be based on the closing price of the security, on the day the securities are received by the Foundation's custodian, in accordance with our Board Policy and Revenue Canada Regulations. Donated securities may be held or sold by the Foundation as determined by the investment policies of the Foundation.
5. If donating actual printed shares, please endorse each of the shares or make them payable to the Huntsville District Memorial Hospital Foundation. Please send the shares by courier directly to the Foundation. The Foundation will then send the shares on to its Investment Broker.

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Please be advised that the value of the donation will be based on the closing price of the security on the day the securities are received by the Foundation's custodian.

### Contact:

Katherine Craine, Executive Director CFRE  
Huntsville Hospital Foundation  
4-100 Frank Miller Drive Huntsville ON P1H 1H7  
T; 705 789- 311 x 2492 | F: 705 789 GIVE (4483)





3000-130 King Street West, Box 21 Toronto, ON M5X 1J9

Date: \_\_\_\_\_

## Charitable Donation of Securities In Kind **\*RUSH\***

Please complete this form for use as Authorization to facilitate a timely transfer. Transfer requests that do not contain the information requested herein may result in delayed deliveries. Please ensure a copy of any necessary supporting documentation is attached to your transfer request such as a Corporate Resolution with sample signatures for a corporate account, Powers of Attorney where the signing authority for an account differs from the client of record etc.

**Please transfer the following position:** Description: \_\_\_\_\_  
Quantity: \_\_\_\_\_ CUSIP: \_\_\_\_\_

### Delivering Institution Information (Required) Delivering Institution

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

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

Account #: \_\_\_\_\_ Delivering Institution FINS or DTC: \_\_\_\_\_

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

### Receiving Institution Information (Required) Receiving Institution

Name: National Bank Correspondent Network

Account Name: Huntsville District Memorial Hospital Foundation 705-789-4756 | www.huntsvillehospitalfoundation.ca

Charitable Registration No: 89371 5292 RR0001

Account #: 6C4QBXA Receiving Institution FINS T007 or DTC: 5008

Contact Name: Ajit Rekhy Phone: 416-542-2295

**Additional Information:** Please include any additional necessary 'For Further Credit' or Reference Information.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Contributing Client Authorization:

Client Signature: \_\_\_\_\_

**Delivering Institution:**  
*Please forward a completed copy of this form to Client Transfer Services Transfer In Department prior to making your delivery. Email to [ajit.rekhy@nbc.ca](mailto:ajit.rekhy@nbc.ca)*

This message including any attachment(s) is intended only for the addressee and may contain information that is confidential, legally privileged or exempt from disclosure under applicable law. Any review, retransmission, dissemination or other use of or taking any action in reliance upon this information by any person or entity other than the addressee is prohibited. If you have received this communication in error or are not the addressee, please immediately notify the sender and destroy all copies.