

# Donation of Publicly Traded Securities to North Okanagan Hospice Society



Thank you for supporting North Okanagan Hospice Society with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple and may result in significant tax savings for you.

## 1. Donor Information

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

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

## 2. Donor's Broker Information

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

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

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

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

Fax: \_\_\_\_\_

## 3. Securities to be Transferred

From Account # \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

# of shares                      name of security

\_\_\_\_\_ shares of \_\_\_\_\_

# of shares                      name of security

I authorize this transfer as a charitable donation to North Okanagan Hospice Society. I agree that North Okanagan Hospice Society, or its agent, may contact my broker for the purpose of concluding this transaction.

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

Signature of Donor/Client

Additional Comments/Instructions:

### Your Donation Receipt

- The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the Society's custodian, RBC Dominion Securities, Inc.
- *Exception – Transfers from an Estate:* Please contact North Okanagan Hospice Society representative listed here for information regarding the valuation of securities.

1. Complete this form. This information is needed for the transfer, tracking and receipting.

2. Give the form to your broker. Your broker will arrange for the transfer of shares to North Okanagan Hospice Society investment account. North Okanagan Hospice Society cannot initiate the transfer. If you do not have a broker, give this form directly to your investment firm.

3. Send a copy of the form to our broker (or ask your broker to do this):

#### **RBC Dominion Securities**

Carola Brunner  
Phone: 250-549-4073  
Fax: 250-545-4139  
Email:  
carola.brunner@rbc.com

4. Send a copy of the form to North Okanagan Hospice Society (or ask your broker to do this), so we may ensure a donation receipt is issued for your gift.

#### **We are located at:**

North Okanagan Hospice Society  
3506 – 27 Avenue  
Vernon, BC V1T 1S4  
Phone: 250-503-1800  
Fax: 250-503-1844

#### **Contact:**

Ruth Edwards, Executive Director  
Direct: 250-503-1800 ext. 106  
Email: ruth@nohs.ca

*North Okanagan Hospice Society  
Charitable Registration Number is:  
10817 0648 RR0001*