

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. Email or Mail 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:

Lisa Matthews, Executive Director
Direct: 778 475 9189
Email: lisa@nohs.ca Or
Eileen Wang, Financial Officer
Direct: 778 475 9186
Email: eileen@nohs.ca
*North Okanagan Hospice Society
Charitable Registration Number is:
10817 0648 RR0001*