



GIFT OF PUBLICLY TRADED SECURITIES TO NESHAMA HOSPICE
(for Canadian and American-listed securities only)

To donate your gift of stock to Neshama Hospice, please follow the following four steps:

1. Download and complete all sections of the attached transfer form including the CUSIP Number (which is provided by your broker/investment advisor) of the assets being transferred. In order to facilitate and ensure you receive your official receipt for income tax purposes, please return a copy of the completed form to Lisa Kronenberg, Executive Director, Neshama Hospice. Forms can be emailed to lisa.kronenberg@neshamahospice.com. In addition, you may mail the form to 2041 Avenue Rd, Toronto, ON, M5M 4A5 to the attention of Lisa Kronenberg.

Note: Forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. If you send by mail, please advise Lisa Kronenberg, Executive Director, Neshama Hospice by phone at 647-289-7200.

2. In order to initiate your electronic transfer, please forward a copy of the completed transfer form to your broker/investment advisor.

Your broker can arrange for the electronic transfer of shares to our account at TD Wealth Private Investment Advice.

Canadian Dollar #: 8AL252A

US Dollar #: 8AL252B

Dealer/Rep: 9834/XFGL

CUID: GIST

FINS: T007

DTC: 5036

Neshama Hospice BN Registration Number: 765913892RR0001

Neshama Hospice's brokerage contacts at TD Wealth Private Investment Advice are Gillian Martin and Liam Smith. They can be reached by phone or email, as indicated below:

Gillian Martin

T: 905-501-7670

Gillian.Martin@td.com

Liam Smith

T: 905-293-3146

Liam.Smith@td.com

3. Please inform Lisa Kronenberg, Executive Director, Neshama Hospice by email at lisa.kronenberg@neshamahospice.com or by phone at 647-289-7200 once the transfer has been completed. Unexpected and/or unidentifiable transfers may make it difficult for Neshama Hospice to issue the appropriate tax receipt.
4. Please be advised that the value of the donation receipt will be based on the closing price of the security on the day the securities are received by TD Wealth Private Investment Advice in accordance with Neshama Hospice board policies and Revenue Canada regulations.

TRANSFER FORM
GIFT OF PUBLICLY TRADED SECURITIES TO NESHAMA HOSPICE
(for Canadian and American-listed securities only)

Donor Information

First Name _____ Last Name _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

Description of Securities

This letter will confirm my intention to donate the following securities to Neshama Hospice:

Security Description _____

Quantity _____ CUSIP/ISIN _____ CAN ☐ U.S. ☐

Security Description _____

Quantity _____ CUSIP/ISIN _____ CAN ☐ U.S. ☐

Security Description _____

Quantity _____ CUSIP/ISIN _____ CAN ☐ U.S. ☐

Broker/Delivering Custodian

Name of Firm _____ FINS# _____ FAX _____

Name of Broker _____ Phone _____

Account Name _____ Client Account Number _____

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Transfer Form – Gift of Publicly Traded Securities to Neshama Hospice (cont'd)



Donor Authorization

Signature: _____

Name (printed): _____

Date (Day/Month/Year): _____

To transfer securities, please advise your broker of the following details about Neshama Hospice's brokerage account at TD Wealth Private Investment Advice:

Canadian Dollar #: 8AL252A

US Dollar #: 8AL252B

Dealer/Rep: 9834/XFGL

CUID: GIST

FINS: T007

DTC: 5036

Neshama Hospice BN Registration Number: 765913892RR0001

Please Note

1. The value of the donation will be based on the closing price of the security on the day the securities are received by TD Wealth Private Investment Advice, in accordance with Neshama Hospice policies and Revenue Canada regulations.
2. Neshama Hospice is unable to issue an income tax receipt until we are aware of your donation. In order to ensure prompt and accurate receipting of your donation, prior to transferring securities to our account, please mail or email this form to:

Lisa Kronenberg, Executive Director
Neshama Hospice
2041 Avenue Rd, Toronto, ON, M5M 4A5
lisa.kronenberg@neshamahospice.com
647-289-7200

Neshama Hospice Charitable Registration Number: 765913892RR0001