

## HOW TO DONATE PUBLICLY TRADED SECURITIES TO NESHAMA HOSPICE

(For the donation of Canadian and American-listed securities only)

### STEP 1: COMPLETE THE TRANSFER FORM

Complete all sections of the Transfer Form (found at the end of this page) including the CUSIP # (which is provided by your broker/investment advisor) of the assets being transferred.

### STEP 2: SEND THE TRANSFER FORM TO YOUR BROKER/ADVISOR

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. They will require the following information:

Canadian Dollar acct#: 8AL252A

US Dollar acct#: 8AL252B

Dealer/Rep: 9834/X6GI

CUID: GIST

FINS: T007

DTC: 5036

Neshama Hospice BN Registration Number: 765913892

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

Doug Martin

T: 905-501-7480 / 1-877-414-1727

F: 905-501-8231

Doug.Martin@td.com

Gillian Martin

T: 905-501-7670 / 1-877-414-1727

F: 905-501-8231

Gillian.Martin@td.com

### STEP 3: SEND A COPY OF THE TRANSFER FORM TO NESHAMA HOSPICE

Send a copy of the completed Transfer Form by email to Robert.kamen@neshamahospice.com or by mail to: 302-336 Spadina Rd., Toronto, ON M5R 2V8.

This will ensure you receive your official receipt for income tax purposes.

Transfer Forms sent by mail will delay the start of the transfer process, and may affect the ultimate receipt value. Please notify Robert Kamen by telephone at 647-289-7200 if you are sending by mail.

### STEP 4: ADVISE NESHAMA ONCE THE TRANSFER HAS BEEN MADE

Once the transfer has been completed, please inform Robert Kamen at Robert.kamen@neshamahospice.com or 647-289-7200. Unexpected and/or unidentifiable transfers may make it difficult for Neshama Hospice to issue the appropriate tax receipt.

In accordance with Neshama Hospice board policies and Revenue Canada regulations, the value of the donation receipt will be based on the closing price of the security, on the day the securities are received TD Wealth Private Investment Advice.

GIFT OF PUBLICLY TRADED SECURITIES TO NESHAMA HOSPICE

# TRANSFER FORM

(For the donation of 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 \_\_\_\_\_

(Continued on next page)

## 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/X6GI      **CUID:** GIST      **FIN:** T007      **DTC:** 5036

**Neshama Hospice BN Registration Number:** 765913892

## Please Note

1) In accordance with Neshama Hospice policies and Revenue Canada regulations, 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

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, be sure to mail or email a copy of this form to:

Robert Kamen, Director of Operations  
Neshama Hospice  
c/o 302-336 Spadina Road  
Toronto, ON M5R 2V8  
robert.kamen@neshamahospice.com  
416-930-0607

Neshama Hospice Charitable Registration Number: 765913892RR0001