

## Donation of Publicly Traded Securities to Surrey Hospital Foundation

Thank you for supporting Surrey Hospital Foundation with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple and will result in significant tax savings.

### 1. Donor Information

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ Prov \_\_\_\_\_ Postal Code \_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_

### 2. Donor's Broker Information

Name \_\_\_\_\_  
Address \_\_\_\_\_  
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

### 4. Transfer Securities In Kind to:

#### Surrey Hospital & Outpatient Centre Foundation Account

RBC Dominion Securities Inc.

**Custodian Name:** RBC DS **Custodian Acct:** 384-20698-11 **CUID:** DOMA

I authorize this transfer as a charitable donation to the Surrey Hospital Foundation. I agree that the Surrey Hospital Foundation, or its agent, may contact my broker for the purpose of concluding this transaction.

\_\_\_\_\_  
Signature of Donor/Client Date

**Additional comments/instructions:** If you are donating **mutual fund shares**, a different form is required. Please call Yolanda Bouwman at 604-585- 5509 to obtain the correct form.

#### 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 Foundation's custodian, RBC Dominion Securities Inc.



## SURREY HOSPITAL FOUNDATION

### Four easy steps

**Complete this form.** This information is needed for the transfer, tracking and receipting of your donation.

**Give the form to your broker.** Your broker will arrange for the transfer of shares to the Surrey Hospital Foundation account. **Surrey Hospital Foundation cannot initiate the transfer.** If you use a self-directed investment account, fax this form to your applicable transfer dept. Call us for correct fax number.

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

RBC DS  
Attn: Debra Stephens  
[debra.stephens@rbc.com](mailto:debra.stephens@rbc.com)  
Tel: 604-535-3853  
Fax: 604-531-4586

**Send a copy of the form to Surrey Hospital Foundation (or ask your broker to do this),** so we may ensure a donation receipt is issued for your gift:  
**Fax 604-585-5550**

Don Hickling Vice-President,  
Leadership Giving  
DL: 604-953-9709  
[don.hickling@fraserhealth.ca](mailto:don.hickling@fraserhealth.ca)

Yolanda Bouwman Director,  
Major Gifts  
DL: 604-585-5509  
[yolanda.bouwman@fraserhealth.ca](mailto:yolanda.bouwman@fraserhealth.ca)

The Surrey Hospital Foundation  
Charitable Registration  
891268740 RR0001