

TRANSFER OF SECURITIES AND MUTUAL FUNDS FORM for self-directed online investment platform

Most securities are held electronically and can be easily transferred from your self-directed online account to a brokerage account held by Kelowna General Hospital Foundation.

I/We authorize the investments identified on this form to be transferred to the Kelowna General Hospital Foundation via its broker. Charitable Number: 11897 8733 RR0001.

DONOR INFORMATION

Donor Type: ☐ Individual ☐ Organization/Company

Donor Name or Company Name: _____

Address: _____

City, Province & Postal Code: _____

Phone: _____ Email: _____

DESCRIPTION OF SECURITIES

Name of Security: _____ CUSIP/ISIN: _____

Number of Shares/Units to Transfer: _____

Investment Platform: _____ Account Number: _____

Brokerage Address: _____ Fax #: _____

Contact Name: _____

Donor Signature: _____ Date: _____

DESCRIPTION OF MUTUAL FUNDS

Name/Description of Mutual Fund: _____

Number of Shares/Units to Transfer: _____

Investment Platform: _____ Account Number: _____

Brokerage Address: _____ Fax #: _____

Contact Name: _____

Donor Signature: _____ Date: _____

Receiving Institution:

RBC Dominion Securities Inc.

180 Wellington St West, 12th Floor, Toronto, ON M5J 0C2

Attn: Account Transfer Department

Account Number: 832-11643-14 Dealer/Rep Code: 9190/VFW

CUID: DOMA, DCT: 5002, EuroClear: 90065

Gift Designation:☐

Area of Greatest Need _____

☐

Fund or Purpose _____

Donor Recognition *(includes annual Impact Report, permanent displays, internal reports, online and other printed materials):*

☐

I/We would like this gift recognized in the name(s) of: _____

☐

Please do not publish my name(s) as a donor to the Kelowna General Hospital Foundation.

To donate your gift of securities to the KGH Foundation, please complete the following steps:

STEP 1

Complete the Transfer of Securities and Mutual Funds Form. Instruct your delivering institution to use this form to help complete the transfer. Sending a copy of this form to your delivering institution may provide sufficient authorization. You may also wish to follow-up with your delivering institution to help ensure your instructions are carried out as specified.

STEP 2

Click the **SUBMIT** button below to send the completed form by email, notifying the KGH Foundation of your intention to donate. Alternatively, you can print the completed form and fax to the KGH Foundation. This helps us anticipate your gift and ensure we have the correct information from you.

Kelowna General Hospital Foundation
Attn: Zachary Jones, Director of Finance
Email: zachary.jones@interiorhealth.ca
Tel: 250.862.4300 ext. 27017
2268 Pandosy Street
Kelowna, BC, V1Y 1T2

RBC Dominion Securities
Tel: 250.712.2148
1200-1631 Dickson Ave
Kelowna, BC, V1Y 0B5

SUBMIT

Ensure you review your form for accuracy before you submit.

Upon receipt of the transferred securities to the KGH Foundation brokerage account, we will issue a charitable tax receipt. Please be advised that the value of the securities for purposes of the gift receipt is determined as of the date the gift is received in our brokerage account, according to KGH Foundation Board approved policy. In the case of securities other than mutual funds, it is the average trading price on the date of the gift. For mutual funds, it is the closing value.

KGH Foundation Charitable Number: 11897 8733 RR0001

Thank you for your support to provide
world-class healthcare right here at home.



Giving **Changes** Everything.