St. Joseph's Foundation of Sudbury

Letter of Direction for Donation of Publicly Traded Securities of Canadian and U.S. Listed Securities

Your broker must initiate this transaction by transferring the shares/units to our broker. Unexpected and/or unidentifiable transfers may make it difficult for the Foundation to promptly issue the tax receipt. Please note, the transfer of units in mutual funds is a manual process and typically takes longer than electronic transfers of stock shares. The Foundation will issue a tax receipt to the donor for the value of the gift at the close of business on day of transfer completion. Unless otherwise agreed to by the Donor and Foundation in advance, all shares/units will be sold as soon as possible after the receipt.

To initiate your gift transfer, please complete this form and send it to your broker and provide a copy by email or fax to St. Joseph's Foundation of Sudbury, Attn. Kristal Lafantaisie, Director of Development, at klafantaisie@sjsudbury.com.

ELECTRONIC TRANSFER OF SECURITIES FOR CHARITABLE PURPOSES

Broker Name: _____
Telephone: _____
Broker Firm: _____
Broker Address: _____

DONOR INFORMATION:

Name: _____
Address: _____
City: _____ Province: _____ Postal Code:
Phone number: _____
Email: _____

ACCOUNT INFORMATION:

St. Joseph's Foundation Brokerage Account Number: 613-24147-12

GIFT DESIGNATION

- ☐ Area of Greatest Priority
- ☐ St. Joseph's Villa of Sudbury
- ☐ St. Joseph's Continuing Care Centre of Sudbury
- ☐ Villa St. Gabriel Villa of Sudbury
- ☐ St. Joseph's Lodge of Manitoulin Island

TRANSFER FROM:

Account #
Account Name: _____

SECURITIES TO BE DONATED:

Company/Fund: _____ CUSIP: _____ #
# of shares/units _____ Estimated $ Value: $ _____

DELIVERY INSTRUCTIONS

Transfer To: RBC Dominion Securities Inc.
Attention: Beau Frescura, CPA, CMA
Tel: 705 523 3753 | Fax: 705 523 3726
Email: beau.frescura@rbc.com

I authorize St. Joseph's Foundation of Sudbury or its agent to contact my broker for purposes of concluding this transaction. Please arrange for this transfer as expeditiously as possible.

_____

Donor Signature Date