

# Gift of Securities & Mutual Funds Transfer Authorization Form

# IT'S SIMPLE

Your Legacy, Their Future

## Donor(s) Information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Donor's Broker Information:

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name of Security: \_\_\_\_\_

Number of Units: \_\_\_\_\_

Account Number: \_\_\_\_\_

Approximate Value of Each Unit: \_\_\_\_\_

Expected Date of Transfer: \_\_\_\_\_

## Donor(s) Authorization:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Three Easy Steps:

1. Notify us by completing and signing this Gift of Securities Transfer Authorization Form and mail or fax it to Children's Health Foundation. Your broker can assist you.
2. Your broker will contact Children's Health Foundation and initiate the transfer.
3. Your broker will forward this form to either of our brokers (listed below).

Children's Health Foundation will confirm the transfer with you, once the transaction is complete.

A charitable donation receipt will be issued to you for the closing price of the securities on the day they are received by the Foundation.

345 Westminster Avenue  
London, ON, Canada N6C 4V3  
**Phone:** 519.432.8564  
**Email:** info@childhealth.ca  
**Fax:** 519.432.5907  
**Toll Free:** 1.888.834.2496  
childhealth.ca

## Children's Health Foundation Brokers of Record:

RBC Dominion Securities Inc.  
Vito Finucci  
1900-148 Fullarton Street  
London ON N6B 1Z3  
Tel: 519-675-2021  
Fax: 519-675-2020  
vito.finucci@rbc.com  
Account #: 641-22687-13  
FINS#: T000  
CUID#: DOMA

National Bank Financial  
Paul Manders  
33 Dufferin Avenue  
London ON N6B 1Z3  
Tel: 519-439-5341  
Fax: 519-439-6016  
paul.manders@nbf.ca  
Account #: 11-VFHK.A  
FINS#: T080  
CUID#: NBCS

MD Management Ltd.  
Mary Ruddock  
1400-380 Wellington Street, London ON N6A 5B5  
Tel: 519-432-0883 Fax: 519-432-0997  
mary.ruddock@cma.ca  
Account #: Individual account  
provided at time of transfer  
FINS #: T080  
CUID #: MDMN

