



# GIFT OF PUBLICLY TRADED SECURITIES & CANADIAN MUTUAL FUNDS

(For Canadian and American Listed Securities Only)

Please note that Vernon Jubilee Hospital Foundation is unable to issue an income tax receipt until it is aware of your donation. In order to ensure prompt and accurate receipting of your donation, **prior to transferring securities to our account, please fax or email this for to:** VJH Foundation, 2101 32 St., Vernon, BC V1T 5L2 - Fax: 250-558-4133 or email: [terri.manke@interiorhealth.ca](mailto:terri.manke@interiorhealth.ca)

### Donor Information

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Description of Securities

This document will confirm my intention to donate the following securities in kind to Vernon Jubilee Hospital Foundation:



Security Description: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_ Approx. value \_\_\_\_\_    
Security Description: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_ Approx. value \_\_\_\_\_

### Description of Mutual Funds

This document will confirm my intention to donate the following mutual funds in kind to Vernon Jubilee Hospital Foundation:

Mutual Fund Description: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_ Approx. Value \_\_\_\_\_  
Mutual Fund Description: \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_ Approx. Value \_\_\_\_\_

### Broker/Delivering Custodian Information

Name of Firm: \_\_\_\_\_ FINS# \_\_\_\_\_ Fax: \_\_\_\_\_  
Name of Broker: \_\_\_\_\_ Phone: \_\_\_\_\_  
Account Name: \_\_\_\_\_ Client Account Number: \_\_\_\_\_

### Gift Designation

- Areas of Greatest Need; or
- Specific Designation:

### Donor Authorization

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

Please be advised that the value of the donation will be based on the closing price of the security on the day the securities are received by the Foundation's custodian in accordance with our Board Policy and Canada Revenue Agency regulations.

Vernon Jubilee Hospital Foundation Registration Number: 11928 3372 RR0001

**To donate your in kind gift of stock to Vernon Jubilee Hospital Foundation, please complete the following steps:**

1. Download and complete all sections of the transfer form including the CUSIP# (which is provided to your broker/invest advisor) of the assets being transferred. In order to facilitate the transfer and ensure you receive your official income tax receipt, please return a copy of the completed form to VJH Foundation. Forms can be faxed to 250-558-4133 or emailed to [terri.manke@interiorhealth.ca](mailto:terri.manke@interiorhealth.ca) or sent to VJH Foundation, 2101 32 St., Vernon, BC V1T 5L2 (Note: forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. If you plan on sending this form, please notify Terri Manke at VJH Foundation by telephone 250-558-1362)
2. In order to initiate your electronic transfer, please forward a copy of the completed form to your broker/investment advisor.



**For Canadian Securities:** Your broker can arrange for the electronic transfer of shares to RBC Dominion Securities, Vernon, BC; CUID is #DOMA for deposit to Vernon Jubilee Hospital Foundation: Account Number 8111883818



**For US Securities:** Your broker can arrange for the electronic transfer of shares to RBC Dominion Securities, Vernon, BC

To Transfer securities, please advise your broker of the following details:

**Reference account #:** 8111883818 Cash Account

RBC Dominion Securities

Account Transfer Department

180 Wellington St. W, 11th Floor

Toronto, Ontario M5J 0C2

CUID : DOMA

**For Vernon office assistance contact:** Paul Philips

Telephone: (250) 549-4068 or 1-800-663-6439 Fax: (250) 545-4139

Email: [paul.philps@rbc.com](mailto:paul.philps@rbc.com)

3. Please inform Terri Manke at VJH Foundation once the transfer has been completed. Unexpected and/or unidentifiable transfers may make it difficult for us to issue the appropriate tax receipt.
4. Please be advised that the value of the donation receipt will be based on the closing price of the security, on the day the securities are received by the Foundation's custodian, in accordance with Board Policy and Canada Revenue Agency regulations.
5. If our advisor cannot facilitate the transaction, the VJHF Finance committee will be notified immediately to determine how to proceed with the donation. Once a solution is found, VJHF will then notify the donor and/or his or her broker as to how to proceed. For any other problems with a transfer, please instruct the donor or broker to contact:

Kate McBrearty  
Executive Director  
VJH Foundation  
2101 32nd Street  
Vernon, BC V1T 5L2  
Telephone: (250) 558-1200 ext. 1405  
Fax: (250) 558-4133  
Email: [kate.mcbrearty@interiorhealth.ca](mailto:kate.mcbrearty@interiorhealth.ca)

or  
Terri Manke  
Development Assistant  
VJH Foundation  
2101 32nd Street  
Vernon, BC V1T 5L2  
Telephone: (250) 558-1362  
Fax: (250) 558-4133  
[terri.manke@interiorhealth.ca](mailto:terri.manke@interiorhealth.ca)