

Process for making a Donation of Securities by Electronic Transfer

Prior to initiating your gift transfer, please complete this form and email it to Brenda MacNeil, Niagara Health Foundation Finance Officer at Brenda.MacNeil@niagarahealth.on.ca

- For tracking purposes, please instruct your Investment advisor to contact:
Simone Taddeo @ TD Wealth Private Client Group
Email: simone.taddeo@td.com Phone Number: 905-331-5247
- Have your Investment Advisor prepare and process a signed Letter of Direction to Transfer Securities.

Pertinent receiving account information:

Niagara Health Foundation
Custodian: TD Waterhouse
Account: PIC ISM account Number: 1HAMTJA
CUID: GIST
DTC: 5036

Note: Please send a copy of the Letter of Authorization or In-kind Charitable Donation Transfer form to TD Wealth. Attention: Simone Taddeo.

A charitable receipt will be issued for the value of the securities at the close of the business day on which they are invested with
Niagara Health Foundation
Charitable Registration Number: 89940 2697 RR0001

Please discuss estimated timing of transfer with your Investment Advisor, as this will vary depending on the delivering institution and time of year.

Phone: 905-323-FUND (3863) | foundation@niagarahealth.on.ca | www.NiagaraHealthFoundation.com

Welland (Head) Office:
65 Third St.
Welland, ON
L3B 4W6

Niagara Falls Office:
5546 Portage Rd.
Niagara Falls, ON
L2E 6X2

St. Catharines Office:
1200 Fourth Ave.
St. Catharines, ON
L2S 0A9

Port Colborne Office:
260 Sugarloaf St.
Port Colborne, ON
L3K 2N7

Donor Information

Name for charitable receiving purposes: _____

Full Address:

Broker/Agent Information

Dealer/Institution firm Name: _____

Broker/Agent Name: _____

Market Security Information

Name & Market Symbol: _____

Class (if any): Type (common, preferred, mutual fund, etc.): _____

Number (volume) of shares/units: Estate market value\$: _____

Print Name: _____ Signature: _____

Donation Date: _____