Gifts of Securities

Three easy steps:

The IWK Foundation welcomes gifts of securities, such as stocks, bonds and mutual funds.

Make your gift today or in your will. To donate now, please complete this form and send a copy to your broker. It is important that you also send a copy to us so that we can track your donation and issue a receipt for income tax purposes.

**STEP 1:** Please complete all sections of the security transfer form below.
*Please note that your advisor/broker will provide you with the CUSIP #.***STEP 2:** Please notify the IWK Foundation of your donation. You may submit the form electronically by email, fax or by mailing a copy of the completed transfer form to us at:

**IWK Foundation**
Attention: Gena Walton
B220 - 5855 Spring Garden Road
Halifax, NS B3H 4S2
Fax: (902) 470-8000
Email: gena.walton@iwk.nshealth.ca

IMPORTANT: Notifying us is an essential step because securities are transferred into our account without your name. We value every gift and want to provide you with an accurate acknowledgment and recognition for your donation.

**If you have any questions or would like to discuss transferring a physical share certificate form, please contact Gena’s direct line at (902) 470-8993.**

**STEP 3:** Give the completed transfer form to your broker or investment advisor. Your broker or investment advisor is responsible for initiating the transfer. Please note: All transfers of securities to the IWK Foundation are subject to review, approval and acceptance by the IWK Foundation. The value of your tax receipt will be based on the price on the day our custodian receives the securities in the Foundation account.

Please note that we are unable to issue a receipt for income tax purposes until we receive your donation.

Thank you for sharing our vision of providing the best care and nothing less for women, infants and children in the Maritimes.

NOTIFICATION OF SECURITIES TRANSFER

**To (Name and address of broker/advisor):** Click or tap here to enter text.

I hereby give authorization to provide a charitable gift of securities from my account number:

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

**Electronic transfer of shares can be sent to:**

CIBC Mellon Global
900 - 1 York Street Toronto, ON M5J 0B6
Email: accounting\_team\_2@cibcmellon.com
Account Name: IWK Health Centre Foundation CUID: COMO
CSM: A/C #IWEF5001002

For prompt issuance of an income tax receipt, a signed copy of this transfer form must be faxed to (902) 470-8000, or sent via e-mail to: gena.walton@iwk.nshealth.ca. If you are wanting to discuss transferring a physical share certificate please call Gena Walton at (902) 470-8993 or e-mail gena.walton@iwk.nshealth.ca.

TO BE COMPLETED BY DONOR:

**Name of Donor:** Click or tap here to enter text.

**Daytime Telephone:** Click or tap here to enter text.

**Donor’s Address:** Click or tap here to enter text.

**Donor’s Email:** Click or tap here to enter text.

**Name of Donor’s Broker:** Click or tap here to enter text. **Broker’s Telephone:** Click or tap here to enter text. **Firm:** Click or tap here to enter text.

|  |  |  |
| --- | --- | --- |
| Name of Security: | Number of Shares Transferred: | CUSIP # of Security being donated: |
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 **I wish my donation to be used:**

Choose an item. Other: Click or tap here to enter text.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Click or tap to enter a date.