



IWK Foundation



## Gifts of Securities - Three easy steps:

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

Your gift can be made today or [in your will](#). To make a donation 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 the security transfer form below. For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor Information section. Please note that your advisor/broker will provide you with the CUSIP #.

**STEP 2:** Please notify IWK Foundation of your donation. You may submit the form electronically by hitting "submit now", faxing or mailing a copy of the completed transfer form to us at:

IWK Foundation  
Attention: Judy Jacklin  
B220 - 5855 Spring Garden Road  
Halifax NS B3H 4S2  
Fax: (902) 470-8000  
Email: [judy.jacklin@iwk.nshealth.ca](mailto:judy.jacklin@iwk.nshealth.ca)

This is an important 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 transfer a certificate form, please contact Judy's direct line at (902) 470-6579 or our Guest Services Administrator at (902) 470-8085.

**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 the securities are received by our custodian in the Foundation account.**

Please note that we are unable to issue a receipt for income tax purposes until we receive your donation. Your broker cannot divulge your name or contact information, so please send us this form.

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):

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

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](mailto:accounting_team_2@cibcmellon.com)  
Account Name: IWK Health Centre Foundation  
CUID: COMO  
CSM: A/C #IWEF1001002

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: [judy.jacklin@iwk.nshealth.ca](mailto:judy.jacklin@iwk.nshealth.ca) To transfer securities to use in certificate form, please call 1-800-595-2266 or e-mail to: [judy.jacklin@iwk.nshealth.ca](mailto:judy.jacklin@iwk.nshealth.ca)

### TO BE COMPLETED BY DONOR:

Name of Donor:

Daytime Telephone:

Donor's Address:

Donor's Email (if e-receipt is preferred):

Name of Donor's Broker:

Broker's Telephone:

Firm:

Name of Security/Mutual Fund:

Number of Shares Transferred: CUSIP # of Security being donated :

### I wish my donation to be used:

Area of Greatest Need

Please direct my donation to:

According to Will specification

Signature of Donor:

Date:

### For more information, please contact:

IWK Foundation  
B220 - 5855 Spring Garden Road Halifax, NS B3H 4S2  
1-800-595-2266