



24 Huron Street West
Exeter, ON
N0M 1S2
519-235-2700 ext. 5133

**South Huron Hospital Foundation (SHHF)
GIFT OF SECURITIES – TRANSFER AUTHORIZATION FORM**

THE PROCESS

1. DONOR INFORMATION

Name(s): _____
Address: _____
Phone: _____
Email: _____

1. Forward the completed Transfer Authorization Form **to your broker to initiate transfer.** Please note, SHHF cannot initiate this transfer on your behalf.
2. Your broker will forward a copy of the completed form to:
Scotia Wealth Management
Attention: Kelly Hansen
kelly.hansen@scotiawealth.com
or by fax to
519-660-3208 AND to the SHHF at
krista.mccann@shha.on.ca

(Please include any additional donor direction if applicable, eg. memorial tribute name, special project designation, etc.)

2. SECURITIES TRANSFER AUTHORIZATION (contact your broker for assistance)

Name of Brokerage Firm: _____
Brokers Name & Transit: _____
Brokers Phone & Email: _____
Account Number: _____
Name & Symbol of Security: _____
Number of Units/Shares: _____

3. The value of the charitable receipt will be based on the price the securities are sold for in the brokerage account.
4. Upon receiving this transfer, Scotia Wealth Management will contact the SHHF and advise of the details of the transfer.
5. The SHHF will contact the donor and issue a Tax Receipt within 60 days.
6. The South Huron Hospital Foundation Charitable Registration Number: 11915 7808 RR0001
7. Please contact the South Huron Hospital Foundation regarding Estate Gifts if applicable.
krista.mccann@shha.on.ca

3. South Huron Hospital Foundation's Brokerage Account Details:

Name of Receiving Firm: ScotiaMcLeod
Account Name: SOUTH HURON HOSPITAL FOUNDATION
Charity Broker Account: 425-73156-16
Dealer Code: 9155
CUID #: SCOT
DTC #: 5011
FINS #: T085
Broker Contact Name: Kelly Hansen
Broker Contact E-mail: kelly.hansen@scotiawealth.com
Broker Phone Number: 519-660-3248

4. DONOR AUTHORIZATION

DONOR SIGNATURE: _____

DONOR SIGNATURE: _____

DATE: _____

Thank you sincerely for your generous and impactful gift of securities to the South Huron Hospital Foundation!