



## Gift of Publicly Traded Securities

211 Lake Avenue East  
Carleton Place, ON K7C 1J4  
613.257.4483

foundation@carletonplacehosp.com

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## Transfer Form

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Thank you for your gift of securities to Carleton Place & District Memorial Hospital (CPDMH) Foundation. To start the process of your gift transfer, please complete the information below and send the information to your broker. **To ensure that the CPDMH Foundation can track, acknowledge and send you a tax receipt, please return a copy of the form to the Foundation Office prior to transferring your gift** by fax to 613-257-5197, or by mail

To: \_\_\_\_\_  
*Please print name of financial institution*

Attention: \_\_\_\_\_  
*Please print advisor's name and phone number*

### Instructions to Advisor

I, \_\_\_\_\_ hereby authorize you to transfer (insert number) \_\_\_\_\_ shares/units of (type of stock, bonds, mutual funds) \_\_\_\_\_ from (account number) \_\_\_\_\_ to:

**Name of Charitable Organization:** Carleton Place & District Memorial Hospital Foundation

**Charitable Registration #:** 86610 5398 RR0001

**Contact Name & Telephone#:** Robyn Arseneau, Executive Director 613-257-GIVE (4483)

**Brokerage house carrying the organization's account:** NBF Inc. (NBIN Division) Transit: 5925-1

**Organization's brokerage account#:** 6CH4DWA (Canadian Stock) OR 6CH4DWB (US Stock)

**Address of Brokerage:** 1010, rue de la Gauchetière Ouest, Mezz. 100, Montréal, Québec, H3B 5J2

**CUID code of receiving broker:** NBBCS CLEARSTREAM# 37220

**DTC code of receiving broker:** 5008 FINS# T080

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### Donor Information

Donor Name: \_\_\_\_\_

Address \_\_\_\_\_ City/Prov/PostalCode \_\_\_\_\_

Phone \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Please contact **Robyn Arseneau, Executive Director of the CPDMH Foundation**, at 613-257-GIVE (4483) or by e-mail at foundation@carletonplacehosp.com if you have any questions about the Gifts of Securities transfer process.

*Thank you for supporting the Carleton Place & District Memorial Hospital Foundation!*