

## Gift of Publicly Listed Securities

Thank you for considering a gift of securities to Orillia Soldiers' Memorial Hospital Foundation (the Foundation). Making a gift of publicly listed securities is a simple, easy process and a wonderful way to support the Hospital. Below are procedures which will assist you in making your gift. We are pleased to issue a charitable tax receipt for your contribution based on the market value of the transferred securities, determined at the close of trading on the day our brokerage firm receives the securities.

In order for securities to be legally transferred and accepted by the Foundation and our brokerage firm, a completed and signed copy of this form must be forwarded to your Investment Advisor, the Foundation and our brokerage firm. Please note that unidentifiable and/or unexpected gifts may not be accepted for legal reasons.

### DONOR INFORMATION

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

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### GIFT INFORMATION

Name of Securities Transferred: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Approximate Value: \$ \_\_\_\_\_ Date of Transfer: \_\_\_\_\_

Gift Designation: \_\_\_\_\_

*By signing this document, you are legally transferring ownership of stock to OSMH Foundation and authorize our brokerage firm and/or OSMH Foundation to contact you regarding the details of the donation.*

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

### DONOR INVESTMENT FIRM INFORMATION

Brokerage Firm: \_\_\_\_\_ FINS: \_\_\_\_\_ CUID: \_\_\_\_\_

Broker Name: \_\_\_\_\_ Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Step 1: Please complete and sign the form above and send to your Investment Advisor to initiate the transfer.**

**Step 2: Please have your Advisor forward a copy of this completed form to the Foundation and BMO Nesbitt Burns (contacts noted below).** The copy will serve to advise our Broker of the incoming donation and will assist with timely processing of your donation and charitable tax receipt.

BMO Nesbitt Burns  
OSMH Foundation  
Att: Robert Marck  
Acct #: 575-01244-13  
FINS: T009 CUID: NTDT  
T: (705) 326-0891  
F: (705) 326-2218  
E: robert.marck@nbpcd.com

OSMH Foundation  
Charitable Registration #:  
BN 88932-1998-RR0001  
Mark Riczu, Executive Director  
T: (705) 327-9158  
F: (705) 325-4693  
E: mriczu@osmh.on.ca

