



# GIFT OF PUBLICLY TRADED SECURITIES TO SICKKIDS FOUNDATION

(FOR SECURITIES INCLUDING STOCKS, BONDS AND MUTUAL FUNDS)

Please note that SickKids Foundation is unable to issue an income tax receipt until we are aware of your donation. In order to ensure prompt and accurate receipting of your donation, **prior to transferring securities to our account, please email this form to:**

### SickKids Foundation

attn: Finance P 416-813-8181  
525 University Avenue, Suite 835 E securities.gifts@sickkidsfoundation.com  
Toronto, Ontario M5G 2L3

### Donor Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

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

Phone \_\_\_\_\_ Email \_\_\_\_\_ Foundation Contact \_\_\_\_\_

### Description of Securities - Equities/Mutual Funds/Bonds

This letter will confirm my intention to donate the following securities to SickKids Foundation:

|                            |                |                                |                                     |                                    |
|----------------------------|----------------|--------------------------------|-------------------------------------|------------------------------------|
| Security Description _____ | Quantity _____ | CUSIP/ISIN/<br>FUND CODE _____ | <b>CAN</b> <input type="checkbox"/> | <b>US</b> <input type="checkbox"/> |
| Security Description _____ | Quantity _____ | CUSIP/ISIN/<br>FUND CODE _____ | <input type="checkbox"/>            | <input type="checkbox"/>           |

### Broker/Delivering Custodian Information

Name of Firm \_\_\_\_\_ FINS# \_\_\_\_\_ Fax \_\_\_\_\_

Name of Broker \_\_\_\_\_ Broker email \_\_\_\_\_ Phone \_\_\_\_\_

Account Name \_\_\_\_\_ Client Account Number \_\_\_\_\_

### Gift Designation

- Highest Priority Needs of SickKids Foundation (default); or
- Specific Designation:

\_\_\_\_\_ Date (Day/Month/Year) \_\_\_\_\_

### Donor Authorization

Signature \_\_\_\_\_

To transfer securities, please advise your broker of the following details:

**For Canadian Brokerage Houses**, transfer to:  
TD Waterhouse Canada Inc.: A/C: 8AP963A (CAD) /  
8AP963B (USD) FINS#: T007 CUID/DCS#: GIST

**For US/International Brokerage Houses**, transfer to:  
TD Waterhouse Canada Inc.: A/C 8AP963A (CAD) / 8AP963B  
(USD) DTC#: 5036 Agent ID#: 53266  
Institutional ID#: 66296



## GIFT OF PUBLICLY TRADED SECURITIES TO SICKKIDS FOUNDATION

(FOR SECURITIES INCLUDING STOCKS, BONDS AND MUTUAL FUNDS)

### To donate your gift of stock to SickKids Foundation, please follow the following four steps:

1. Download and complete all sections of the transfer form including the CUSIP # (which is provided by your broker/investment advisor) of the assets being transferred. In order to facilitate the transfer and ensure you receive your official receipt for income tax purposes, please return a copy of the completed form to the finance department at SickKids Foundation. Forms can be emailed to: securities.gifts@sickkidsfoundation.com, or sent by mail to:

**Attn: Finance**

**SickKids Foundation**

525 University Avenue, Suite 835  
Toronto, ON M5G 2L3

**PHONE** 416-813-8181

**Note:** Forms sent by mail will delay the start of the transfer process, and may affect the ultimate receipt value. Please notify the finance department at the Foundation by telephone at 416-813-8181 if you send by mail.

2. In order to initiate your electronic transfer, please forward a copy of the completed transfer form to your broker/investment advisor.

**For Canadian Brokerage Houses:**



Your broker can arrange for the electronic transfer of shares to our Account at TD Waterhouse Canada Inc. via CDS :

**CUID: GIST**

**Buyer Internal Account Number: 8AP963A (CAD) / 8AP963B (USD)**



**For US/International Brokerage Houses:**

Your broker advisor can arrange for the electronic transfer of shares to our Account at TD Waterhouse Inc. via DTC :

**DTC No: 5036**

**Agent ID: 53266**

**Institution (IID): 66296**

**Buyer Internal Account Number:**

**8AP963A (CAD) / 8AP963B (USD)**

**Contacts at TD Waterhouse Canada Inc.**

Rocco Cacciaccaro, Investment Advisor

Phone: 416.307.6124 / Fax: 416.307.6680

Email: rocco.cacciaccaro@td.com

3. Please inform the finance department at the Foundation once the transfer has been completed. Unexpected and/or unidentifiable transfers may make it difficult for us to issue the appropriate tax receipt.
4. Please be advised that the value of the donation receipt will be based on the closing price of the security, on the day the securities are received by the Foundation's custodian, in accordance with our Board Policy and Revenue Canada Regulations.