

DIRECT TRANSFER OF STOCK OR MUTUAL FUNDS as in-kind charitable donation

Send the original copy of the transfer form to your broker and a copy to Simone Taddeo (info below) and Kristina Manzi, HDS Foundation, along with any selling restrictions or gift designations.

I/We hereby authorize:

Name of Donor's Brokerage Firm:	
Contact Name:	
Address:	
Phone:	Fax:
Email:	

To transfer the following from account number: _____

Quantity	Name of Security	Symbol, if applicable
Notes:		

to the following **Hotel Dieu Shaver Foundation** account:

Brokerage:	TD CTS Wealth, C/O T4657 PO Box 4657, Station A Toronto, ON M5W 0K8	Account Number: 1H77B0A Custodian: TD Waterhouse Account: PIC ISM account	For in-kind securities, send via CDS: GIST, DTC #5036 Dealer/rep# 9834-KBTC
Investor:	Tim Caughey, MBA, CFA Senior Portfolio Manager, TD Wealth Private Investment Advice		
Contact:	Simone Taddeo Administrative Associate, TD Wealth PIA	Phone: 905-331-5247 or 905-315-2675 Email: simone.taddeo@td.com	

Donor's information:

Full Name (as it is to appear on charitable tax receipt, if applicable)	
Address:	
Phone:	Fax:
Email:	

I understand that the value of this gift is determined by the closing price of the shares on the day that they are received into the account of Hotel Dieu Shaver Foundation, and that I will receive a charitable donation receipt for that amount.

Signed:

Date:

Please Note: As year-end giving ramps up, processing times can slow down. Donations received after December 15 will be processed on a best effort basis for completion in the current tax year.