

# Gift of Securities

## Transfer Authorization Form

### 1. Donor Information

**Name:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
\_\_\_\_\_

### 2. Donor's Broker Information

**Institution Name:** \_\_\_\_\_  
**Broker's Name:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Name of Security:** \_\_\_\_\_  
**# of Units:** \_\_\_\_\_  
**Account No.:** \_\_\_\_\_  
**Approx. Value of Each Unit: \$** \_\_\_\_\_  
**Approx. Total Value of Donations: \$** \_\_\_\_\_  
**Date of Transaction to QEHF's Account:** \_\_\_\_\_

### 3. Queen Elizabeth Hospital Foundation Inc. at Fidelity Clearing Canada (Fidelity) ULC

483 Bay Street, Suite 200, South Tower Toronto, ON M5G 2N7 Telephone# 416-217-7440 Email: Acctransfer.fcc@fmr.com

Please select the area you would like to designate your funds towards:

Annual Equipment Priorities      or       Endowment Fund

### **Comments:**

**Firm:** Richardson Wealth Limited - The Ross MacDougald Hickey Team

**Contact:** Julie Connolly or Luanne Coady

**Branch:** 80 Grafton Street, Suite 500 Charlottetown, PE C1A 1K7

**Phone:** 902-620-2600      **Fax:** 902-620-2601

**Correspondence:** rmhteam@richardsonwealth.com

**Account No:**  (CAD\$) H26-ORG0-A or  (US\$) H26-ORG0-B

**Dealer No.:** 7673      **Advisor/Rep Code:** HK14

**DTC #:** 5040      **CUID:** FIDC

### 4. Donor Authorization

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

\_\_\_\_\_  
Date

## The Process

**1. Complete** all sections of this Gift of Securities Transfer Authorization Form. You may require additional forms from your broker to initiate the share transfer.

**2. Send this form to your broker** Your broker will advise us of the securities donation and we'll provide our broker's information. Please direct any questions from your broker to:  
**Tracey Comeau: 902-894-2509**

**3. Authorization** - simply sign to authorize the transfer of securities to QEHL Foundation. Your broker must initiate the transfer to our account.

**4. Email** - have your broker email the information to: QEHL; Tracey Comeau [tacomeau@ihis.org](mailto:tacomeau@ihis.org), Cheryl Cassidy [clcassidy@ihis.org](mailto:clcassidy@ihis.org), and [rmhteam@richardsonwealth.com](mailto:rmhteam@richardsonwealth.com)

**5. Confirmation** - QEHL will confirm with you once the security is received in our account. The value of the charitable receipt is determined by the closing price on the day QEHL receives the securities in our account.