

# Charitable Donation of Securities In-Kind Form

NAME OF DONOR \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

TELEPHONE \_\_\_\_\_

This is my authorization to transfer \_\_\_\_\_ shares

of \_\_\_\_\_  
(COMPANY/INVESTMENT NAME)

Currently held by \_\_\_\_\_  
(YOUR BROKERAGE FIRM)

Account Number \_\_\_\_\_  
to St. Joseph's Health Care Foundation as a donation.

A Donation of shares will be transferred through St. Joseph's Health Care Foundation's brokerage firm. (FOR OFFICE USE ONLY)

Brokerage Firm \_\_\_\_\_

Account Number \_\_\_\_\_

FINS# \_\_\_\_\_

CUID \_\_\_\_\_

## Name of Donor's Broker and Telephone Number

NAME OF BROKER \_\_\_\_\_ TELEPHONE \_\_\_\_\_

SIGNATURE OF DONOR \_\_\_\_\_ DATE \_\_\_\_\_

## How to Make a Gift of Securities

1. Contact St. Joseph's Health Care Foundation to advise us that you wish to make a gift of securities and complete this Charitable Donation of Securities In-Kind form.
2. If you work with an investment advisor, inform them of your plans to make a gift of securities. They will help you complete this form.
3. If you self-manage your investments, the Foundation is available to help you complete this form and guide you through the transfer process.
4. Your advisor or investment firm will contact the Foundation's brokerage firm to complete the transfer.
5. A charitable donation receipt will be issued to you for the closing price of the securities on the day that they are received by St. Joseph's Health Care Foundation's brokerage firm.
6. When filing your income tax for the current year, complete the Capital Gains on Gifts of Certain Capital Property Form from Canada Revenue Agency.

St. Joseph's Health Care Foundation  
550 Wellington Road, London, ON N6C 0A7  
Telephone: 519 646-6085 Facsimile: 519 685-4065

Registered Charitable Number: 11918 3390 RR0001



Renowned for compassionate care, St. Joseph's is one of the best academic health care organizations in Canada dedicated to helping people live to their fullest by minimizing the effects of injury, disease and disability through excellence in care, teaching and research.



[sjhcfoundation.org](http://sjhcfoundation.org)