



GIFT OF PUBLICLY TRADED SECURITIES & CANADIAN MUTUAL FUNDS

(For Canadian and American Listed Securities Only)

Please note that Vernon Jubilee Hospital Foundation is unable to issue an income tax receipt until it is aware of your donation. In order to ensure prompt and accurate receipting of your donation, **prior to transferring securities to our account, please fax or email this for to:** VJH Foundation, 2101 32 St., Vernon, BC V1T 5L2 - Fax: 250-558-4133 or email: terri.manke@interiorhealth.ca

Donor Information

First Name: _____ Last Name: _____

Mailing Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Description of Securities

This document will confirm my intention to donate the following securities in kind to Vernon Jubilee Hospital Foundation:



Security Description: _____ Quantity _____ CUSIP/ISIN _____ Approx. value _____

Security Description: _____ Quantity _____ CUSIP/ISIN _____ Approx. value _____

Description of Mutual Funds

This document will confirm my intention to donate the following mutual funds in kind to Vernon Jubilee Hospital Foundation:

Mutual Fund Description: _____ Quantity _____ CUSIP/ISIN _____ Approx. Value _____

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Broker/Delivering Custodian Information

Name of Firm: _____ FINS# _____ Fax: _____

Name of Broker: _____ Phone: _____

Account Name: _____ Client Account Number: _____

Gift Designation

Areas of Greatest Need; or

Specific Designation: _____

Donor Authorization

Signature: _____


Date: _____

Please be advised that the value of the donation 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 Canada Revenue Agency regulations.

Vernon Jubilee Hospital Foundation Registration Number: 11928 3372 RR0001

To donate your in kind gift of stock to Vernon Jubilee Hospital Foundation, please complete the following steps:

1. Download and complete all sections of the transfer form including the CUSIP# (which is provided to your broker/invest advisor) of the assets being transferred. In order to facilitate the transfer and ensure you receive your official income tax receipt, please return a copy of the completed form to VJH Foundation. Forms can be faxed to 250-558-4133 or emailed to terri.manke@interiorhealth.ca or sent to VJH Foundation, 2101 32 St., Vernon, BC V1T 5L2 (Note: forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. If you plan on sending this form, please notify Terri Manke at VJH Foundation by telephone 250-558-1362)

 2. In order to initiate your electronic transfer, please forward a copy of the completed form to your broker/investment advisor. **For Canadian Securities:** Your broker can arrange for the electronic transfer of shares to CI Investment Services Inc., 15 York Street, 7th Floor, Toronto, Ontario, M5J 0A3; CUID is #BBSM DTC #5085 DEALER#7736 for deposit to Vernon Jubilee Hospital Foundation: Account Number 4004111011



For US Securities: Your broker can arrange for the electronic transfer of shares to CI Investment Services Inc.

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

Reference account #: 4004111011 Cash Account

CI Investment Services Inc.

Attention: Account Transfer Department

15 York Street, 7th Floor

Toronto, Ontario, M5J 0A3

Fax Number : (416) 288-8611 Telephone: (1) 877-310-1088

Email: transfer_ciis@ci.com

DEALER #7736 DTC #5085 CUID #BBSM

For Vernon office assistance contact: Brent Barker

Telephone: (250) 545-5258 or 1-877-755-5757 Fax: (250) 545-6679 Email: brentbarker@fraserbarker.com

3. Please inform Terri Manke at VJH Foundation at terri.manke@interiorhealth.ca 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 Board Policy and Canada Revenue Agency regulations.

5. If our advisor cannot facilitate the transaction, the VJHF Finance committee will be notified immediately to determine how to proceed with the donation. Once a solution is found, VJHF will then notify the donor and/or his or her broker as to how to proceed. For any other problems with a transfer, please instruct the donor or broker to contact:

Kate McBrearty
Executive Director
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Vernon, BC V1T 5L2
Telephone: (250) 558-1200 ext. 1405
Fax: (250) 558-4133
Email: kate.mcbrearty@interiorhealth.ca

or
Terri Manke
Finance Coordinator
VJH Foundation
2101 32nd Street
Vernon, BC V1T 5L2
Telephone: (250) 558-1362
Fax: (250) 558-4133
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