

# Gift of marketable securities.

Letter of authorization from donor to broker. (August 2023)

Thank you for deciding to transfer securities to The Princess Margaret. **To ensure we can track your donation and promptly issue a tax receipt, please complete this form and send a signed copy to your Broker and to The Princess Margaret at [giftofstock@thepmcf.ca](mailto:giftofstock@thepmcf.ca).**

**Please note**, if you plan to donate securities that are thinly traded, highly volatile, or not easily liquidated, please call Jill Nelson, Associate Vice-President, Estate Giving at 416-738-7329 BEFORE initiating a transfer. **All transfers are subject to review, approval and acceptance by the Foundation.**

## A. Donor Information

Name

Phone

Address

Please select how you'd like to receive your receipt:

City

Mail

Email

Province

Signature

Postal Code

Date

Email

I have notified the foundation of this gift.

## B. Information About Your Broker / Brokerage Account

Broker's Name

Financial Institution

Broker's Telephone Number

Name on Account

Broker's Email

Account #

## C. Description of Your Securities to be Donated

Number of Shares

PMCF Fund

Name of Security

I would like my gift to be designated where the need is greatest.

CUSIP#

Other Designation

Expected Date of Transfer to PMCF

*Please note,  
your tax receipt will be valued as per applicable Canada Revenue Agency guidelines.*

## D. Account Information for The Princess Margaret Cancer Foundation

Transfer To:

For:

**Donors:** Direct all inquiries to Joe Figliomeni at 647-639-9199 or [giftofstock@thepmcf.ca](mailto:giftofstock@thepmcf.ca).

BBS FINS# T079  
CUID/DCS WGDB  
DTC 5030  
EUROCLEAR 10034 (BK of  
NYC/WGI)  
DEALER REP 9280  
REP CODE SZA  
ABA# 021000018

**The Princess Margaret  
Cancer Foundation**  
Account # 415-20911-22

**Brokers:** Direct Broker to Broker inquiries to Lira Lamaca at 416-594-7955, Fax: 416-594-7951 or [lira.lamaca@cibc.ca](mailto:lira.lamaca@cibc.ca).

# Make a donation in four easy steps:

1. **Download** this letter of authorization.
2. **Complete all sections**, most importantly, the **CUSIP#** which will be provided by your broker or investment advisor. This number serves as a transaction number in case the transfer needs to be tracked.

For privacy reasons, your broker cannot disclose your name to us, so please **complete the Donor/Client Information**, including your daytime phone number.

3. Send the completed transfer form to **your broker or investment advisor** who will initiate, and be responsible for the transfer. If you are using a **self-directed brokerage**, you will need to **call your financial institution** and ask them to initiate the transfer. The Foundation is not responsible for the transfer.

4. Notify the Foundation by emailing a copy of the completed transfer form to [giftofstock@thepmcf.ca](mailto:giftofstock@thepmcf.ca).

This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, any appropriate recognition, and your official receipt for income tax purposes.

For more information, visit [thepmcf.ca/donate/gifts-of-securities](http://thepmcf.ca/donate/gifts-of-securities).

**Note:** Your receipt will be valued based on the closing price on the day the shares are legally transferred to the Foundation's account at our custodial agent, CIBC Wood Gundy. All shares will be sold as quickly as possible after transfer.

