

Gift of Marketable Securities

Letter of authorization from donor to broker (October 2025)

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 giftsofstock@thepmcf.ca.

All transfers are subject to review, approval and acceptance by the Foundation.

A. Donor Information

Name

Address

City

Province

Postal Code

Email

Phone

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

Mail

Email

Signature

Date

I have notified the Foundation of this gift.

B. Event Information (if applicable)

Event Name

Participant ID

Participant Name

C. Information About Your Broker / Brokerage Account

Broker's Name

Financial Institution

Broker's Telephone Number

Name on Account

Broker's Email

Account #

D. Description of Securities to be Donated

Number of Shares

Name of Security

CUSIP#

Expected Date of Transfer to The PMCF

PMCF Fund

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

Other Designation

Please note:

your tax receipt will be valued as per applicable Canada Revenue Agency guidelines.

E. Account Information for The Princess Margaret Cancer Foundation

Transfer To:

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

For:

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

Donors: Direct all inquiries to
Joe Figliomeni at 647-639-9199 or
giftsofstock@thepmcf.ca

Brokers: Direct Broker to Broker inquiries
to Lira Lamaca at 416-594-7955,
Fax: 416-594-7951 or 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

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

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 the transfer.

