

INSTRUCTIONS FOR TRANSFER OF PUBLICLY TRADED SECURITIES

Thank you for choosing to give a gift of stock to the Bruyère Foundation. Under current Canadian tax regulations, your donation of publicly traded securities is exempt from capital gains tax **only** when you transfer the securities in-kind to a registered charity.

Electronic Transfer – Canadian or US Securities

INSTRUCTIONS

Direct Investing Clients

- Download a copy of your direct investing firm’s form from their website, complete and provide to them via fax at number provided

Brokerage Clients

- Complete and sign a Notice of Donation of Gift of Securities form for each publicly traded security.
- Provide form to your broker

Broker

- To support the electronic transfer of shares to the Bruyère Foundation’s Investment Advisor, please forward the form to our Investment Advisor, BMO Nesbitt Burns, prior to the transfer.
 - Lawrence Pleet: lawrence.leet@nbpcd.com

BROKERAGE DETAILS

Account name / Charitable organization name	Bruyère Foundation Inc.
Brokerage account	BMO Nesbitt Burns
Account number	49021454-18
Account transfer department	7 th floor, 250 Yonge Street Toronto ON M5B 2M8
Delivery instructions	FINS:T009 DTC: 5043 CUID: NTDT
Dealer number	9185 REP CODE:MBJ
Charitable Registration Number	88846 0441 RR0001

For questions, please contact Liisa Vexler, Director of Planned Giving
Lvexler@bruyere.org OR 613.562.6319 x1265

Bruyère Foundation, 43 Bruyère Street Ottawa ON K1N 5C8
www.Bruyere.org

Bruyère Foundation supports patient care and research for care of the elderly, palliative and sub-acute care.
 Thank you for making a positive impact.

NOTIFICATION OF GIFT OF SECURITIES		
DONOR INFORMATION		
Donor Name:		
Daytime Phone:	Email:	
Street address:		
City:	Province:	Postal Code:
BROKER/INSTITUTION INFORMATION		
Broker/Institution Name:		
Broker address:	Account #:	
Phone:	E-mail:	Fax:
City:	Province:	Postal Code:
Advisor's Name:		
DONATION INFORMATION		
Name of Security:		
CUSIP:	Number of Shares/Units:	Date of Transfer:
Securities being transferred to:		
Bruyère Foundation	Account: 49021454-18	
BMO Nesbitt Burns	ATTN: Lawrence Pleet	lawrence.pleet@nbpcd.com
Tel: 613-562-6478		
<i>Please note that the date of the gift will be deemed to be the date on which the securities arrive in the Bruyère Foundation BMO Nesbitt Burns account. The value of the securities will be deemed to be the value of said securities at the close of business on the date received in the account.</i>		
Donor's Signature		Date

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