

Donating Publicly Traded Securities



Bringing the best of care,
close to home in the North

Thank you for your interest in donating securities to Spirit of the North Healthcare Foundation. A gift of publicly-traded securities, such as stocks, bonds or mutual funds can be made to Spirit of the North and is very easy to do. Simply follow these instructions:

1. Complete the attached form (you may need your investment advisor's assistance) and deliver it to your broker or advisor. Inform them that you would like to make a gift of securities to Spirit of the North.
2. Your advisor should contact and deliver the form and the securities to our agent, RBC Dominion Securities Inc.

For account of:	Spirit of the North Healthcare Foundation
Account Number:	8360661113
Contact:	Mark Ryan or Carter Andersen
Phone:	250-960-4927 or 250-960-4690
Fax:	250-960-4694

Additionally please send a copy to Spirit of the North Healthcare Foundation:
Fax: (250) 565-2595 or email shauna.allan@northernhealth.ca

3. Once the securities have been transferred to Spirit of the North's investment account, RBC Dominion Securities will advise us of the receipt of the securities and the closing bid value on the day the securities were received into our account.
4. We will issue an official receipt to you, for income tax purposes, for the value of your donation, as determined by RBC Dominion Securities.
5. It is Spirit of the North's policy that securities, once received by us or RBC Dominion Securities, may be sold or added, in specie, to Spirit of the North's investment account in accordance with the investment policies of Spirit of the North Healthcare Foundation.
6. RBC Dominion Securities cannot accept securities that have been consolidated, split, or are not trading on a North American exchange.

Thank you again for making a difference to your community through a donation to Spirit of the North Healthcare Foundation. If you have any questions or concerns, please do not hesitate to call us at (250) 565-2515. Ask for Judy Neiser or Shauna Allan.

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In order to make your gift, please complete this form and fax it to your advisor (the delivering custodian). Your advisor will be able to provide the CUSIP and FINS numbers.

Your advisor needs to fax this completed form to RBC Dominion Securities Inc. at 250-960-4694 and they will take deliver the securities.

Your advisor may contact Mark Ryan or Travis Stringer at 250-960-4927, if required, to further coordinate the transfer.

RBC must receive the securities in its account before the securities can be valued and a charitable tax receipt issued.

Unexpected and/or unidentifiable transfers may make it difficult for Spirit of the North to issue the appropriate tax receipt. Please contact Shauna at 250-645-6161 with any questions about the gift of securities transfer process

Name and Contact Details of Donor's Advisor/Delivering Custodian (DC)

TO: _____
Attention: _____
FINS# _____ Telephone: _____ Fax: _____
Client Account number: _____

Donor/Client Information

FROM: _____
Full Address: _____

Telephone: _____

Instructions from Donor to Donor's Advisor/DC

I hereby give authority to deliver, free as a charitable gift, the following securities to **RBC Dominion Securities Inc.** for credit to Spirit of the North

Healthcare Foundation, account # _____ Please deliver free:

Full Name of Security: _____

CUSIP#: _____

Market Symbol: _____ Number of Shares/Units to transfer: _____

Authorization of Donor

Date signed: _____

Gift Designation Instructions from Donor to Your Organization

Please use my gift as follows:

Top Priority of: _____
or
Special Fund or Purpose: _____