Instructions to Donate Publicly Traded Securities

The Ottawa Hospital Foundation | L'Hôpital d'Ottawa Fondation

The Ottawa Hospital Foundation greatly appreciates your support. This form outlines the process to make your donation of stock(s) as seamless as possible.

Step 1: Fill Out Form
We require one form for each publicly traded security. This can be filled out by your broker, but it will require the donor's signature*.

Step 2: Share with your Broker
Share a copy of the signed form with your broker. This allows them to arrange the transfer of shares.

Step 3: Submit to Foundation
Send a copy of the signed form to the Foundation, allowing us to track your generous gift and to inform our broker. This can be done by you or your broker.

Email: donatingstocks@toh.ca
Phone: 613-795-3081

Donor Information

Name:

Address:

City:

Province:

Postal Code:

Telephone – Home:

Telephone – Work:

Email:

Ottawa Hospital Foundation Broker Information
(receiving broker)

RBC Investor Services	
Attn: Kathleen Lim	Kathleen.lim@rbc.com
T: 416-955-2377	F:416-974-6905
Canadian Securities CUID #RTRA Account #210750001	**US Securities** DTC #: 0901 Agent #80901 DTC account #: 298307 For further credit to account: 210750002
Please retain shares in book base form	

Securities Transfer Information

Name of Security:

CUSIP #:

Number of Shares/Units:

Date of Transfer (approx.):

Gift Details:

☐ Please designate my gift to the area of greatest need

☐ Other

☐ Pledge Payment

Donor's Signature*:

Date:

Donor Broker Information

(delivering broker)

Name/Institution:

Account No.: Address:

Advisor's Name:

Telephone:

Email:

☐ Donating via CDS

CUID #

☐ Donating via DTC

DTC #

A tax receipt will be issued for income tax purposes.The value of the receipt will be determined by the Fair Market Value of the securities on the date the securities are received in the Foundation's brokerage account, based on the market closing price for the day. If sold prior to the close of day, the Fair Market Value will be the sale value before commissions. In accordance with our Board Policy, securities will be sold as soon as possible.