

How to Make a Gift of Mutual Funds

If you hold mutual funds in an account with a major brokerage firm, or if they are held in connection with a mutual fund broker/dealer, you may have your mutual funds transferred to the WDMH Foundation through our account with RBC Dominion Securities (see below, Letter of Intent, FORM 2). Donations of mutual funds take longer to process than gifts of stocks due to the additional steps needed to transfer ownership. The fund company may require you to sign a fund company disclaimer. Contact your broker/dealer to obtain the required form for your signature.

LETTER OF INTENT, FORM 2

Direction to Transfer Mutual Fund Securities In-Kind Electronically for Donation

Contact Information for Donor (*required information)

*First Name

*Last Name

*Street Address (Including PO Box, if applicable)

*City

*Province

*Postal Code

*Preferred Daytime Phone Number

Email Address

Yes, I would like to receive quarterly e-updates from the WDMH Foundation.
(Please provide your email address in the space above)

Wondering where to direct your gift? Please consider the below options, they are listed in order of where your gift is needed most.

- WDMH Family Care Fund – “Supporting Care for Families Just Like Mine” – where my gift is needed most at WDMH.
- WDMH General Equipment Fund – Because the provincial government doesn’t support the purchase of medical equipment for Ontario hospitals and I want to help ensure that WDMH is well-equipped.
- Health Care Undesignated Fund – My gift will be used where it is needed most at WDMH and Dundas Manor Long-Term Care Home.
- Dundas Manor Redevelopment Fund – For a new and vibrant Dundas Manor Long-Term Care Home.
- WDMH Digital Mammography Fund WDMH CT Scanner Fund
- WDMH Cancer Care Fund – Because I am grateful for local cancer care services.
- WDMH Ophthalmology Fund WDMH Building and Renovations Fund

Donor initial _____

To:

Brokerage Firm Name (and FINS #)

*Contact Name

Address

City

Province

Postal Code

Brokerage Firm Contact Name

Telephone Number & Extension

Brokerage Firm Contact Email Address

Re:

Donor(s) Name(s) Account #

Address of Donor(s) City Province Postal Code

I empower you, my broker, to make free delivery of the following mutual funds from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation **(Charitable Registration # 89282 4368 RR0001)**, to:

Account # 504-02397-16
Dealer Code 9190-E75

Number of Units	Mutual Fund Name (including Full Fund Code)
_____	_____
_____	_____
_____	_____
_____	_____

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707, or send by e-mail PDF to kathy.hunt@rbc.com.

Date Name (please print) Signature of Donor

Date Name (please print) Signature of Donor

I acknowledge receipt of this direction to transfer mutual funds.

Donor's Brokerage Firm Signature

Date