

## How to Make a Gift of Shares or Securities

If you donate certain publicly traded securities "in kind" to a registered public charity, including the WDMH Foundation, you are now exempt from the payment of capital gains tax on any profit created by the fair market value of the donation, thanks to a change in regulations in 2006 by the Federal Government of Canada. For convenience and transparency's sake, it is the WDMH Foundation's preference for you to make a donation of securities via electronic transfer from your broker to ours. Please follow the steps listed below to make your gift today, and thank you.

### LETTER OF INTENT, FORM 1

In order to initiate your in-kind gift transfer, please complete this form with your broker and send a copy to Erin Kapcala by either email at [ekapcala@wdmh.on.ca](mailto:ekapcala@wdmh.on.ca), by fax at 613-774-7202 or by mail to: WDMH Foundation, 566 Louise St, Winchester, ON K0C 2K0.

Typically, in order to allow sufficient time to process your gift by the end of the calendar year, transfer instructions should be provided to your broker and our broker no later than December 15th.

The value of the official income tax receipt will be for the value of the shares/securities when they settle into the Foundation's brokerage account, as this is when the transfer of property is deemed to have taken place.

A WDMH Foundation representative will contact you at the telephone number given below to discuss your recognition and gift designation preferences.

**PLEASE NOTE: In order to avoid accepting and transferring shares that cannot be liquidated (sold or transferred), please call Erin Kapcala at 613-774-2422 ext. 6769 at our office prior to submitting the following form to your broker.**

### Direction to Transfer 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:

\_\_\_\_\_  
Donor's Brokerage Firm (and FINS #) Account Number

\_\_\_\_\_  
Address City Province/Postal Code

\_\_\_\_\_  
Brokerage Firm Contact Name Telephone Number & Extension

\_\_\_\_\_  
Brokerage Firm Contact Email Address

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

RBC Dominion Securities, Brockville, ON (CUID #DOMA)  
Account # 504-02397-16  
Dealer Code 9190-E75  
Euroclear 90065 (DTC 5002)

Number of Shares	Security name and ISN
_____	_____
_____	_____
_____	_____
_____	_____

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](mailto: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 securities in-kind.

\_\_\_\_\_  
Donor's Brokerage Firm Signature

\_\_\_\_\_  
Date

