

# A legacy for care close to home



## Letter of Intent, Form 2 – 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. 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.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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

We want your gift to have the impact you want! Please select which fund/s you want your gift directed to. If you would like more information about any of these Funds, please reach out to us or see our **WDMH Foundation Funds – Choose How Your Gift Will Be Used**

### WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor

**Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received.

WDMH Foundation Funds supporting Dundas Manor include:

**New Dundas Manor (Redevelopment) Fund**  **Dundas Manor General Fund**

**Dundas Manor Activity Fund**

WDMH Foundation Funds supporting Winchester District Memorial Hospital include:

**WDMH Family Care Fund**  **WDMH General Equipment Fund**  **WDMH Family Birthing Unit Fund**

**WDMH Cancer Care Fund**  **WDMH Diagnostic Imaging Fund**  **WDMH Ophthalmology Fund**

**WDMH Building and Renovations Fund**



To:

Donor's Brokerage Firm (and FINS #)

Account Number

Street Address

City

Province/Postal Code

Brokerage Firm Contact Name

Telephone Number & Extension

Brokerage Firm Contact Email Address

Re:

Donor(s) Name(s)

Account Number

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

Number of shares

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](mailto:kathy.hunt@rbc.com).

Date

Name

Signature

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I acknowledge receipt of this direction to transfer mutual funds in-kind.

Date

Brokerage firm

Signature

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

In order to initiate your in-kind gift transfer, please complete this form with your broker and send a copy to Erin Kapcala either by 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 Street, Winchester, ON K0C 2K0. A WDMH Foundation representative will contact you to discuss your recognition and gift designation preferences. PLEASE NOTE: In order to avoid accepting and transferring funds that cannot be liquidated (sold or transferred), please call Erin Kapcala at 613-774-2422 ext. 6769 at our office prior to submitting this form to your broker.