

Gift of marketable securities.

Letter of authorization from donor to broker.

To transfer securities to The Princess Margaret, please complete this form and send a copy to your Broker. It is **important that you send us** a copy of this form as well so we can track your donation and send you a tax receipt. Please send a signed copy to giftofstock@thepmcf.ca.

Please note, if you plan to donate securities that are thinly traded, highly volatile, or not easily liquidated, please call Jill Nelson, Associate Vice-President, Estate Giving at 416-738-7329 BEFORE initiating a transfer. **All transfers are subject to review, approval and acceptance by the Foundation.**

A. Donor Information

Name

Phone

Address

Please select how you'd like to receive your receipt:

City

Mail

Email

Province

Signature

Postal Code

Date

Email

B. Event Information (if applicable)

Event Name

Participant ID

Participant Name

C. Information About Your Broker / Brokerage Account

Broker's Name

Financial Institution

Broker's Telephone Number

Name on Account

Broker's Email

Account #

D. Description of Your Securities to be Donated

Number of Shares

PMCF Fund

Name of Security

I would like my gift to be designated where the need is greatest.

CUSIP#

Other Designation

Expected Date of Transfer to PMCF

*Please note,
your tax receipt will be valued as per applicable Canada Revenue Agency guidelines.*

E. Account Information for The Princess Margaret Cancer Foundation

Transfer To:

For:

Donors: Direct all inquiries to Joe Figliomeni at 647-639-9199 or giftofstock@thepmcf.ca.

BBS FINS# T009
CUID/DCS NTDT
DTC 5043
EUROCLEAR 90098
DEALER REP 9185-KLS

**The Princess Margaret
Cancer Foundation**
Account # 375-18452-19

Brokers: Direct Broker to Broker inquiries to Tina Dragneva, BMO Nesbitt Burns at 416-359-4693 or tina.dragneva@nbpcd.com.

Make a donation in four easy steps:

1. **Download** this letter of authorization.
2. **Complete all sections**, most importantly, the **CUSIP#** which will be provided by your broker or investment advisor. This number serves as a transaction number in case the transfer needs to be tracked.

For privacy reasons, your broker cannot disclose your name to us, so please **complete the Donor/Client Information**, including your daytime phone number.

3. Send the completed transfer form to **your broker or investment advisor** who will initiate, and be responsible for the transfer. If you are using a **self-directed brokerage**, you will need to **call your financial institution** and ask them to initiate the transfer. The Foundation is not responsible for the transfer.

4. Notify the Foundation by emailing a copy of the completed transfer form to giftofstock@thepmcf.ca.

This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, any appropriate recognition, and your official receipt for income tax purposes.

For more information, visit thepmcf.ca/donate/gifts-of-securities.

Note, Your receipt will be valued based on the closing price on the day the shares are legally transferred to the Foundation's account at our custodial agent, BMO Nesbitt Burns. All shares will be sold as quickly as possible after transfer.

