

The donor must initiate the transaction directly with their brokerage firm.

See [page 2](#) for the Foundation's account details.

Send this completed form to giftofsecurities@fondationstejustine.org

DONOR* (Owner of the securities)

Full name (Including the name of a representative if the donor is a legal entity)

☐ Individual

☐ Legal entity

☐ Estate*

Full address for the tax receipt (No., street, city, province, and postal code)

Email

Phone

* Please contact the Foundation **BEFORE** transferring any securities from an estate.

BROKERAGE FIRM AND SECURITIES TRANSFERRED

Advisor's name (if applicable)

Brokerage firm where the securities are held

Advisor's email (if applicable)

Brokerage account number (IF the form is used to initiate the transaction)

Planned transfer date

Quantity

Security

Approx. total value

To maximize the impact of your donation, please consider a minimum total amount of **\$1,000** per security and limit the number of different securities transferred, given the administrative and processing fees associated with this type of transaction.

AUTHORIZATION AND TRANSFER TERMS

I authorize my brokerage firm to transfer the above-listed securities to the CHU Sainte-Justine Foundation. The securities are transferred without restriction and will be sold upon receipt. The value of the tax receipt will be determined based on the closing price on the date the securities are received in the Foundation's brokerage account. I acknowledge that the value of the securities may fluctuate and that the Foundation is not responsible for this. The Foundation has not provided me with any tax or legal advice regarding this donation. It is not responsible for any delay or failure in the transfer caused by my brokerage firm or by incomplete or inaccurate information. **To receive a receipt for the current year, the securities must be received before 5:00 p.m. on December 31.**

☐ Send the tax receipt to my advisor (cc to the donor)

Foundation contact person

Nathalie Gagnon

ngagnon@fondationstejustine.org

514 345-4931, ext 6749

Signature

Date

Instructions for settling a securities transfer

Contacts :

Advisor: Catherine Laurin catherine.laurin@nbpcd.com

Assistant : Tracey Regan tracey.regan@nbpcd.com

(514) 282-5836

Canadian securities

Eligible Canadian electronic securities transfers are made through **The Canadian Depository for Securities Limited (CDS) to BMO Nesbitt Burns**. All CDS transactions are carried out using the following information:

Account Name: BMO Nesbitt Burns
Account Number: 330-28415-19 - (CHU Sainte-Justine Foundation)
CUID Number : NTDT

U.S. securities

American securities transfers are carried out through **DTC** for the account of **BMO Nesbitt Burns** using the information below :

Account Name: BMO Nesbitt Burns
DTC Number: 5043
Account Number:: 330-28415-19 - (CHU Sainte-Justine Foundation)

Mutual funds (Unit trusts)

For any mutual fund donation, **please contact us BEFORE the transfer** to ensure the selected funds are eligible and on the approved mutual funds list.

BMO Nesbitt Burns dealer code for mutual funds: **9185**

Please send the following documents to the email address:

nbops.donations@bmonb.com

cc : catherine.laurin@nbpcd.com et tracey.regan@nbpcd.com

- 1) A power of attorney signed by an authorized person at the transferring institution, where the assets are registered, or by the registered holder of the mutual funds.`
- 2) A signed copy of the donor's request.

For any questions or instructions regarding **mutual fund transfers or foreign-currency assets**, please contact the BMO Nesbitt Burns team.