



Colchester East Hants  
Health Centre Foundation

*Rooted in community support.*

**Letter of Instruction**

**Donation of shares**

**Please send to [Sharon.crowe@nshealth.ca](mailto:Sharon.crowe@nshealth.ca)**

Date:

To: *(name of broker and firm)*

Dear \_\_\_\_\_,

I wish to make a charitable donation of securities to the Colchester East Hants Health Centre Foundation in Truro, NS. Please accept this letter as your authority to transfer \_\_\_\_\_ shares of \_\_\_\_\_ from my account # \_\_\_\_\_ to the Colchester East Hants Health Centre Foundation, account # 525-627A-1 CAD with Credential QTrade Securities Inc., 700-111 W. Georgia St., Vancouver BC V6E 4T6

Dealer Code: 7799

Rep Code: 5HKF

Canadian Stocks - CUID-CRED

US \$ Stocks – DTC 5083

Contact for the Foundation's account is:

Vito Ventura  
[vventura@aviso.ca](mailto:vventura@aviso.ca)  
(438) 316-3573

Thank you for your assistance.

Yours truly,

*Print name:*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*Address* Telephone: \_\_\_\_\_

*September 6, 2016*



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## INSTRUCTIONS FOR A GIFT OF PUBLICLY TRADED SECURITIES

Your donation of securities will help the Foundation support your hospital with the purchase of vital medical equipment and allow you to take advantage of reduced capital gains tax on your donation. The following instructions are provided for both electronic transfers and the transfer of securities certificate(s).

### **Electronic Transfer**

- Please contact the Foundation office prior to your planned transfer of securities to discuss the transfer and the purpose of your gift.
- Your broker can arrange for the electronic transfer of shares to the Foundation's account upon receipt of your written instructions. The following information will be required:
  - ❖ Receiving Institution – Credential QTrade Securities Inc. 700-1111 W. Georgia St., Vancouver BC V6E 4T6
  - ❖ Dealer Code: 7799
  - ❖ Rep Code: 5HKF
  - ❖ Canadian Stocks – CUID-CRED
  - ❖ US \$ Stocks – DTC 5083
  - ❖ Account # 525-627A-1 CAD
  - ❖ Contact: Vito Ventura, [vventura@aviso.ca](mailto:vventura@aviso.ca) (438) 316-3573
  - ❖ Foundation Investment Manager Chris Bellefeuille, [cbelfay@cclgroup.com](mailto:cbelfay@cclgroup.com)
- Please inform the Foundation office once you have given instructions to your broker. We will need to alert our broker to expect the transfer and inform them of the name of your broker and the type of security to be transferred.
- **Please note:** *The value of the donation tax receipt is based on the closing trading price on the day the securities are deposited in the Foundation's account through its custodian.*

### **Physical delivery of securities certificates**

- Please contact the Foundation Office to discuss the transfer, the documents required and the purpose of the gift.

- Arrangements for pick-up and delivery to the Foundation office are available, or the shares may be delivered, or sent by registered mail to the following address.

The Colchester East Hants Health Centre Foundation  
600 Abenaki Rd.  
Truro, N.S. B2N 5A1  
Telephone (902) 893-5541  
Charitable Registration # 13359 7476 RR0001

- An Ownership Disclaimer form and Letter of Authorization must be completed to transfer the securities to the Foundation. The Ownership disclaimer form must be filled out in the presence of a notary public and bear the signature of the notary public. The certificate must be signed in the area noted as "form of transfer" and must be signed exactly as the name appears on the front of the certificate and be guaranteed by your banker. Please note that the legal name of the Foundation is **Colchester East Hants Health Centre Foundation**.
- When mailing the documents to the Foundation office the certificates and other forms should be mailed separately. Please use registered mail for the certificates.
- The amount of the donation receipt is based on the closing trading price of the securities on the day the Foundation Office receives delivery of the securities.

Thank you for your support of our hospital. Please do not hesitate to contact the Foundation Office should you require any assistance or information.

**The Colchester East Hants Health Centre Foundation**  
**600 Abenaki Rd.**  
**Truro, N.S. B2N 5A1**  
**(902) 893-5541**  
**sharon.crowe@nshealth.ca**