

Gift of Publicly Traded Securities to Grandview Children's Foundation

Confidential

Thank you for your interest in making a donation of publicly traded securities to Grandview Children's Foundation. We are delighted to be the recipient of such a generous gift in support of Grandview Children's Centre and the 5,600 children and youth with special needs we serve in the Durham Region.

To donate publicly traded securities and mutual funds, please follow the process below:

1. Instruct your broker to contact Jay Kilgannon, Grandview Children's Foundation Investment Advisor, at RBC Wealth Management and let him know that you would like to transfer securities to the Grandview Children's Foundation brokerage account
2. Complete this form and return a copy to Grandview Children's Foundation attention: Sarah Skrabek – sarah.skrabek@grandviewkids.ca or call 905.728.1673 ext. 2338
3. After confirming that your gift can be immediately liquidated, Sarah will be in touch with you or your broker, as appropriate, to provide Grandview Children's Foundation brokerage account information – to receive your gift of securities;
4. After instruction by the donor, the delivering institution initiates the trade and transfers your gift of securities to Grandview Children's Foundation.

A. Information About You

Name: _____

Mailing Address: _____

Phone Number: _____ Email: _____

Delivering Institution Name _____

Broker/Advisor: _____ CUID: _____

Address: _____

Telephone Number: _____ Fax: _____

B. Description of Securities

Name of Securities/Fund: _____ Date of Transfer: _____

Number of Shares: _____ Gift to be used for: _____

Authorization of Donor: _____

Signature

Date (day/month/year)

**** Please note that your charitable tax receipt value will be based on the value of your gifted securities at the close of business on the day they are sold by our brokerage account****

C. Securities to be transferred to the Account of Grandview Children's Foundation

Contact at RBC Wealth Management

Jay Kilgannon

Telephone: 905. 434.5389

Email: jay.kilgannon@rbc.com

Account Name: Grandview Children's Foundation

Account: 522-26898-1-1

This transfer is a charitable donation to Grandview Children's Foundation.

Charitable Business number 89105 8547 RR0001

