



Gift of Stocks & Securities Donation Form Guidelines and Instructions

Thank you for choosing the Sea to Sky Hospice Society as the beneficiary of your generosity. Your gift assists us in fulfilling our charitable mission to promote and provide compassionate care for all Sea to Sky residents with life limiting illness and ongoing support for their loved ones.

There are just 3 easy steps to donate stocks or securities to the Sea to Sky Hospice Society:

Step 1:

Please complete all sections of the stocks/securities donation form.

For privacy reasons, your broker cannot disclose your name to us, so we ask you to please complete the Donor Information section of the form to advise us of your plan to make a donation of stocks or securities.

Your advisor/broker will provide us with your CUISP number which serves as a transaction number in order to track your transfer.

Step 2:

Deliver or send a copy of your completed donation form to the Sea to Sky Hospice Society, and contact:

Leslie de Bie, Executive Director

Sea to Sky Hospice Society

38140 Behrner Drive

Squamish, BC V8B 0J3

Email: leslie.debie@seatoskyhospicesociety.ca Phone: 604.892.6051 ext. 5

Charitable Registration Number: 845821727 RR 0001

This step is important because securities are transferred into the Sea to Sky Hospice's investment account anonymously, without your name listed. Notifying the Sea to Sky Hospice Society will help ensure that you receive your official receipt for income tax purposes and to make the Sea to Sky Hospice Society aware of your intention to donate stocks or securities.

Step 3:

Deliver or send your completed donation form to:

Your broker/investment advisor who is responsible for initiating the actual transfer of securities.

Note: Stocks/securities are considered legally transferred only when the Sea to Sky Hospice Society's custodial agent confirms delivery.

Your charitable tax receipt will be valued based on the price on the close of the day when the stocks/securities are legally transferred to:

The Sea to Sky Hospice Society's custodial agent:

Thank you – please fill in the Sea to Sky Hospice Society's Stocks & Securities Donation Form.



Stocks & Securities Donation FORM for DONORS

Donor Stock & Securities Form to initiate donation of stocks or securities to the Sea to Sky Hospice Society

This form will provide the Sea to Sky Hospice Society with information necessary for issuing a charitable tax receipt and will ensure that the Sea to Sky Hospice Society is aware of your intention to donate stocks/securities.

I would like my gift dedicated in Memory or In Honour of: _____

Your Name: _____

Address: _____

City: _____ Prov: _____ PC: _____

Phone: _____ Cell: _____ Email: _____

Donor's Broker Information

Company's Name: _____

Contact Name: _____

Address: _____ City: _____

Prov: _____ PC: _____ Phone: _____ Email: _____

Transfer Securities from my account: Account # _____

Securities to be donated:

Security/Stock Name	# of units	CUSIP # (your broker knows this number)	intended date of transfer
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Security/Stock Name	# of units	CUSIP # (your broker knows this number)	intended date of transfer
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The stock will be valued for your charitable receipt at the closing price on the day it is received by the Sea to Sky Hospice Society's brokerage account.

Securities Donation Authorization – from Donor to Broker

I authorize the Sea to Sky Hospice Society, or its agent, to contact my broker for the purposes of concluding this transaction.

Donor Signature: _____ Date: _____

SEA TO SKY HOSPICE SOCIETY'S BROKER information & contact details for your broker:

Please mail or deliver the completed form to: Sea to Sky Hospice Society, Attention: Executive Director, 38140 Behrner Drive, Squamish, BC V8B 0J3 **AND** submit a copy to your broker. Thank you.