



# Gift of Securities

## Transfer Authorization Form

### Donor Information:

Name:

Phone:  Email:

Address:

### Donor's Broker Information:

Institution:

Broker's Name:

Name of Security:

# of Units:  Account #:

Approx. Value of Each Unit: \$

Approx. Total Value of Donations: \$

Date Requested Transfer to QEHL Account

Please select the area you would like to designate your funds towards:

#### Annual Equipment Priorities

- (CAD \$) H26-ONKO-A
- (US \$) H26-ONKO-B

#### Endowment Fund

- (CAD \$) H26-OPKO-A
- (US \$) H26-OPKO-B

Comments:

### Donor Authorization

Donor Signature Date

**Firm: Richardson Wealth Limited - The Ross MacDougald Hickey Team**

**Contact:** Julie Connolly or Luanne Coady

**Branch:** 80 Grafton St., Suite 500, Charlottetown, PE C1A 1K7

**Phone:** (902) 620-2600 **Fax:** (902) 620-2601

**Email:** rmhteam@richardsonwealth.com

**Dealer #:** 7673 **Advisor/Rep Code:** HK14

**DTC#:** 5040 **CUID:** FIDC

**Queen Elizabeth Hospital Foundation Inc. at Fidelity Clearing Canada (Fidelity) ULC**

483 Bay Street, South Tower, Suite 200, Toronto, ON M5G 2N7

**Phone:** (416) 217-7440 | **Email:** acctransfer.fcc@fmr.com

## The Process:

**1. Complete and sign the Gift of Securities - Transfer Authorization Form (form).**

**2. Send the form to your broker.** They may require additional forms and must initiate the transfer to the QEHL Foundation account. If you do not have a broker, work directly with the investment firm holding the shares. **Please direct any questions to Tracey Comeau at (902) 894-2509.**

**3. Have your broker email the form to:**

**Tracey Comeau:**

[tacomeau@ihis.org](mailto:tacomeau@ihis.org)

**Candice MacIsaac:**

[cmmacisaac@ihis.org](mailto:cmmacisaac@ihis.org)

**Richardson Wealth:**

[rmhteam@richardsonwealth.com](mailto:rmhteam@richardsonwealth.com)

**4. The QEHL Foundation will confirm receipt once the securities arrive.** The tax receipt will be based on the closing price on the day Richardson Wealth receives the securities.

### **QEHL Foundation**

PO Box 6600,

Charlottetown, PE C1A 8T5

(902) 894-2425

[info@qehfoundation.pe.ca](mailto:info@qehfoundation.pe.ca)

**Charitable Registration Number:**

89217 7965RR0001