



Gift of Publicly Traded Shares to Mackenzie Health Foundation

Thank you for your interest in donating securities to Mackenzie Health Foundation. A gift of publicly traded stocks, bonds or mutual funds can be made to the Foundation and designated in support of the area of your choice.

To transfer securities, please follow the steps below:

1. Complete the form below and send it to your broker or financial advisor. Your broker will be able to provide you with certain information including the CUSIP and FINS numbers.
2. Once the form is complete, your broker should send a copy of the form to Scotia Wealth.

For the account of Mackenzie Health Foundation

Account number: 467 – 30128 – 13

Scotia Wealth
115 - 675 Cochrane Drive
Markham, ON L3R 0B8
Fax: (905) 479 - 8248

Contact information:

Neil Stratton
(905) 479 - 8244

neil.stratton@scotiawealth.com

Vicki Laforge
(905) 479 - 8246

vicki.laforge@scotiawealth.com

3. Upon receipt of the transferred securities in the Foundation's brokerage account, Scotia Wealth will advise us of receipt of the securities and the closing bid price on the day the securities are received in our account.
4. For donation receipt purposes, the value of the shares will be determined by closing bid price at close of business the day the shares are received in the Foundation's account. The donation receipt will be issued to you for fair market value of the shares as determined by the closing bid price.

Thank you for helping to improve health care in our growing community. If you have any questions or concerns, please contact:

Nicole McCahon, President & CEO
Mackenzie Health Foundation
10 Trench St., Richmond Hill, ON L4C 4Z3
(905) 883-1212 x7820
nicole.mccahon@mackenziehealth.ca

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To initiate your gift of securities transfer, please complete this form and send to your broker. Please also send a copy via email to foundation@mackenziehealth.ca

Donor Information

Name: _____

Full Address: _____

Daytime Telephone: (_____) _____

Donor's Broker Information

Institution Name: _____ FINS # _____

Broker Contact Name/e-mail: _____

Telephone: (_____) _____ Fax: (_____) _____

Client Account Number: _____

Instructions from Donor to Donor's Broker

I hereby give authority to transfer free and clear, as a charitable gift, the following securities to Scotia Wealth: FINS: T085 DTC: 5011 CUID: SCOT for credit to account 467 – 30128 – 13 in the name of Mackenzie Health Foundation.

I acknowledge that the transfer has not been formally accepted as a donation unless and until a donation receipt has been issued by the Foundation. I further acknowledge the Foundation's broker will liquidate securities upon receipt, and liquidation does not imply acceptance.

Please deliver free of transfer fees:

Security: _____

Number of Shares/Units: _____

Market Symbol: _____

CUSIP Number: _____

Authorization of Donor/Client

Signature

2023 - _____ - _____
Year - Month - Day

Witness

2023 - _____ - _____
Year - Month - Day

Gift Designation Instructions from Donor to Mackenzie Health Foundation

Please use my gift as follows:

Top Priority of Mackenzie Health Foundation

or

Specific Fund or Purpose: _____

(Please specify)