



# GIFT OF SHARES TO ST. PAUL'S FOUNDATION OF VANCOUVER

In order to make your gift, please complete this form with your broker.  
Your broker must email or fax this form to the Foundation at:

**Attn: Taylor Hopper**  
**Email: SPFSharesDonation@providencehealth.bc.ca**  
**Fax: 604-806-9105      Tel: 236-326-2519**

so that we may notify our custodian to accept the transfer.  
Your broker must also deliver the shares to Scotiatrust (details below).

**Donor/Client Information:**

Name: \_\_\_\_\_ Telephone: (    ) \_\_\_\_\_

Address: \_\_\_\_\_

**Broker Information and Donor Authorization:** **Client Account #** \_\_\_\_\_

Name of Broker: \_\_\_\_\_ Firm: \_\_\_\_\_

Broker's Tel: (    ) \_\_\_\_\_ Email: \_\_\_\_\_ CUID/DTC: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_

Name of Shares	No. of Shares	CUSIP #	Stock Symbol

Please use my gift as follows:

- St. Paul's Foundation Fund
- Specific fund or purpose: \_\_\_\_\_

I wish to make a charitable gift consisting of publicly traded shares to St. Paul's Foundation of Vancouver (Charitable Registration No. 11925 7939 RR0001). Please accept this form as my authorization for you to **transfer in-kind**, the above listed shares from my brokerage account to the St. Paul's Foundation of Vancouver's custodial account held at Scotiatrust (trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from St. Paul's Foundation of Vancouver. The amount of the receipt will be based on the value as of the close of trading on the date the shares are received by St. Paul's Foundation of Vancouver in their custodial account.

Signature of Client: \_\_\_\_\_ Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Transfer Information for Scotiatrust (broker for St. Paul's Foundation):**

The custodial account for St. Paul's Foundation of Vancouver is held at Scotiatrust.

**CDS FINS No.: T525      CUID: BNSC**  
**DTC Participant No.: 4816      Inst/Agent ID No.: 53440**  
**ACCOUNT NUMBER: \*\*\*78013728-19\*\*\* This should be referenced as part of the transfer.**

## Donation of Publicly Traded Shares to St. Paul's Foundation of Vancouver

Thank you for your interest in donating publicly traded shares to St. Paul's Foundation of Vancouver (CRA Charitable Registration No. 11925 7939 RR0001). A gift of shares is a tax effective opportunity to transform assets into immediate and significant support for the people and families served by Providence Health Care ("PHC") through its acute care hospitals, long-term care centres, and other facilities, including St. Paul's Hospital. By donating and transferring shares to a Canadian registered charity like St. Paul's Foundation, you eliminate the capital gains tax that becomes payable if you were to sell those shares on the market.

Transferring shares is very easy to do. Simply follow these directions:

1. Advise your broker or investment advisor of your wish to make a gift of shares to St. Paul's Foundation of Vancouver and complete the attached transfer form (with your broker's assistance).
2. Your broker must deliver the transfer form to us and the shares to our Custodian, Scotiabank.  
  
For account of: St. Paul's Foundation of Vancouver  
Account Number: 78013728-19
3. Your broker **must** deliver the transfer form to our office, to the attention of **Taylor Hopper** via Email: [SPFSharesDonation@providencehealth.bc.ca](mailto:SPFSharesDonation@providencehealth.bc.ca) or fax: 604-806-9105. (If we do not receive a copy of the completed transfer form we are unable to instruct our Custodian to accept the transfer of shares and this will delay the completion of the transaction and the issuance of an official tax receipt.)
4. Upon receipt of the transferred shares to the Foundation's Scotiabank account, we will issue an official receipt to you, for income tax purposes, for the market closing price on the day the shares are received in our Scotiabank account.
5. It is the Foundation's policy that shares, once received by the Foundation, will be sold for cash to fulfill the donor's philanthropic wishes.

Thank you again for making a difference in the lives of patients, and families, in BC. If you have any questions or need additional information, please do not hesitate to call either:

Taylor Hopper  
Finance Officer  
(T) 236-326-2519  
[thopper2@providencehealth.bc.ca](mailto:thopper2@providencehealth.bc.ca)

Karen E. Brown  
Director of Estate Giving & Philanthropy Administration  
(T) 604-806-8271  
[kbrown@providencehealth.bc.ca](mailto:kbrown@providencehealth.bc.ca)