

The Process:

1. Forward the completed transfer form to your broker/investment advisor to initiate your electronic transfer of securities.
2. Forward a copy of the completed transfer form to Barbara Patten, **Shine Foundation**, at barbara.patten@shinefoundation.ca for our records.
3. The fair market value will be determined as of the closing price on the day the securities are **received** by the Shine Foundation.

Donor Details

Mr. Mrs. Ms. Miss Dr. Other Click or tap here to enter text. Anonymous: Yes No

First Name: Click or tap here to enter text.

Initial: Click or tap here to enter text.

Last Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Apt. No. Click or tap here to enter text.

City, Province: Click or tap here to enter text.

Postal Code: Click or tap here to enter text.

Home Phone: Click or tap here to enter text.

Business Phone: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

Securities Transfer Authorization

A) Please submit to your broker to initiate the transfer:

Broker: Click or tap here to enter text.

Financial Institution: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email: Click or tap here to enter text.

I hereby authorize a transfer of the following securities as a gift to the Shine Foundation:

Name of Shares: Click or tap here to enter text.

CUSIP Details: Click or tap here to enter text.

Number of Shares: Click or tap here to enter text.

From my account # Click or tap here to enter text.

To the Shine Foundation Account at **RBC PH&N Investment Counsel:**

Account # 464-02948-17

Contact: Bridgett Bailey

148 Fullarton Street, 18th Floor, London, ON N5A 5P3

FIN: T002

DTC:5002

Phone: 519-282-6422 Fax: 519-432-4315

CUID:DOMA

EUROCLEAR: 90065

Email: bridgett.bailey@rbc.com

Click or tap to enter a date.

Donor Signature

Date

B) Please have your broker fax/email this form to RBC PH&N Investment Counsel at 519-432-4315 or bridgett.bailey@rbc.com advising them that they are about to receive a securities transfer. A separate document should be used for each donation.

C) Please send a copy by email to: Barbara Patten
Shine Foundation
barbara.patten@shinefoundation.ca

Please Note

- Any donation of securities received after 5 p.m. on December 10th of that year will be processed on a best-efforts basis.
- If the donor would like to donate physical “certificates,” the Shine Foundation must provide written approval of acceptance of delivery of these shares and the certificate must be delivered to RBC PH&N Investment Counsel at the address above in person and signed in front of a staff member.
- Upon receiving this transfer, RBC PH&N IC will contact the Shine Foundation and will advise of the details of the transfer. The Shine Foundation will contact the donor and issue a tax receipt.

Value of Donated Securities

Your gift of publicly traded securities will be valued for receipting purposes at the close of date market value on the day the security is received in the Shine Foundation’s brokerage account. Although donated securities are normally sold the same day they are received, there may still be a small fluctuation in value due to the difference between receipt and sale times. This in no way affects the value you will be able to claim on your tax return, which will be the value shown on your donation receipt.

Privacy

The Shine Foundation respects your privacy. The personal information you provide will be updated in our database and used to provide you with a receipt for your gift and provide information about events and activities, Shine programs, and fundraising.

At any time, you have the right to request that your personal information cease to be used for programs and services or for fundraising purposes. For more information or to make a request, please contact us at 519-642-0990 or info@shinefoundation.ca



**Thank you for donating to
The Shine Foundation**

Charitable Registration Number 12995 4822 RR0001

The Shine Foundation
1100 Dearness Drive, Unit 21 London, ON N6E 1N9
519.642.0990 / www.shinefoundation.ca
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