

## 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](mailto: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

Anonymous: ☐ Yes ☐ No

First Name:

Initial:

Last Name:

Address:

Apt. No.

City, Province:

Postal Code:

Home Phone:

Business Phone:

Email Address:

## Securities Transfer Authorization

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

Broker:

Financial Institution:

Phone Number:

Email:

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

Name of Shares:

CUSIP Details:

Number of Shares:

From my account #

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

Account # 464-02948-17

**Contact:** Bridgett Bailey

148 Fullarton Street, 18<sup>th</sup> Floor, London, ON N5A 5P3

FIN : T002

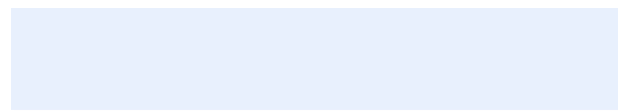
DTC :5002

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

CUID: DOMA

EUROCLEAR: 90065

Email: [bridgett.bailey@rbc.com](mailto:bridgett.bailey@rbc.com)



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](mailto: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  
[barbara.patten@shinefoundation.ca](mailto: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 you 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](mailto:info@shinefoundation.ca)

## Thank you for donating to 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](http://www.shinefoundation.ca)  
Charitable registration Number  
129954822 RR0001