

## Notification of a Gift of Securities

### INSTRUCTIONS TO DONORS

PHE Canada is grateful for your gift of securities. Please note that we only accept securities that do not have a holding period as they are sold immediately upon receipt. Under current tax regulations, your donation of publicly traded securities is exempt from capital gains tax only when you transfer the securities in-kind. A charitable donation receipt for income tax purposes will be issued based on the fair market value of the securities on the date (closing price) the securities are received into PHE Canada's brokerage account.

To donate publicly traded securities, please follow these steps:

1. Complete all required information on this form, including your signature and date.
2. Send a copy of this form to your broker with instructions to complete the transfer of securities in-kind.
3. Fax a copy of this form to Jodie Lyn-Harrison at 613-523-1206 and to Cindy Brunke, BMO Nesbitt Burns at 613-237-7801. You can also mail it to the address below or call to notify us of your intention.
4. If you don't have a fax or an email, please ask your broker to assist you.

If you have questions about the gift of securities transfer process, please contact Jodie Lyn-Harrison at 613-523-1348 x223 or [jodie@phecanada.ca](mailto:jodie@phecanada.ca).

### Thank you for your support.

**Physical and Health Education Canada**  
 301-2197 Riverside Drive  
 Ottawa ON Canada K1H 7X3  
 Tel: (613) 523-1348 Fax: (613) 523-1206  
 Email: [info@phecanada.ca](mailto:info@phecanada.ca)  
 Web: [www.phecanada.ca](http://www.phecanada.ca)

Charitable Registration No. 11882 9035 RT0001

### SECURITIES TRANSFER FORM

#### My Information:

First name: \_\_\_\_\_

Last name: \_\_\_\_\_

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

City: \_\_\_\_\_ Postal code/ZIP: \_\_\_\_\_

Home telephone: \_\_\_\_\_

Email: \_\_\_\_\_

#### Brokerage Information and Transfer Instructions:

My account name: \_\_\_\_\_

My account number: \_\_\_\_\_

Brokerage institution name: \_\_\_\_\_

Broker's name: \_\_\_\_\_

Broker's address: \_\_\_\_\_

Broker's telephone: \_\_\_\_\_

Name of the Securities: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

#### Securities Being Transferred To:

Account Name: Physical and Health Education Canada (PHE Canada)

Account Number: #4601309414

BMO Nesbitt Burns Inc.

Attention: Account Transfer Dept.

250 Yonge Street, 7<sup>th</sup> Floor

Toronto, ON M5B 2M8

Contact: Cindy Brunke

Tel: (613) 567-6234 Fax: (613) 237-7801

Email: [cindy.brunke@nbpcd.com](mailto:cindy.brunke@nbpcd.com)

Dealer #9185 Rep Code M3R

FINS: T009

CUID: NTD

DTC: 5043

My Signature: \_\_\_\_\_

Date: \_\_\_\_\_