

Instructions for a gift of publicly listed securities

A donation of publicly listed securities allows you to support healthcare excellence at the QEII Health Sciences Centre and take advantage of the elimination of capital gains tax on the donated securities.

ELECTRONIC TRANSFER

Please contact the QEII Health Sciences Centre Foundation office at 902 334 1546 prior to your planned transfer of securities to discuss the securities being considered, the purpose of your gift and the transfer process.

Your broker can arrange for the electronic transfer of your shares to our account. The QEII Foundation's account custodian is:

BMO Nesbitt Burns
Attention: Mark Elliott
1675 Grafton Street, 14th Floor
Halifax, NS B3J 0E9

Tel: 902 496 1167 | Toll free: 1 800 841 7993 | Fax 902 423 7011
Email: mark.elliott@nbpcd.com

Your broker will need the following account numbers for the transfer:

FINS - # T009
Account - # 28011741-17
CUID - # NTDT
Broker Rep - # AHL
DTC - #5043 (for U.S. Transactions only)

- Your broker will require written instructions from you authorizing the transfer. [A sample form is attached.](#)
- It is important to notify us prior to contacting your broker to transfer the securities to ensure the securities can be easily identified by our account custodian and avoid delays in processing your donation.
- Please provide the name and contact information of your broker, the type of securities being transferred and the number of shares or units.

Please note: The value of your donation receipt will be based on the closing bid price on the day the securities are received in the QEII Foundation's account through our custodian.

PHYSICAL DELIVERY OF SECURITIES CERTIFICATES

Please contact the QEII Health Sciences Centre Foundation office at 902 442 7196 to discuss the securities certificates being considered, the purpose of your gift, and the transfer process.

THANK YOU!

As innovative research and technology open doors for new treatments, donors like you are the catalysts.

A gift of securities to the QEII Foundation goes to work immediately – funding advanced equipment and technology, fueling groundbreaking medical research or supporting vital patient care. Your donation can be designated to a care area that is meaningful to you or directed to an area of greatest need.

If you have any questions about the QEII Foundation, the securities transfer process or the impact of your generosity, please do not hesitate to contact the QEII Foundation team.

Thank you, again, for your generous support of health care at the QEII Health Sciences Centre!



QEII Health Sciences Centre Foundation
5657 Spring Garden Road
Park Lane Mall, Floor M3, Box 231
Halifax, Nova Scotia B3J 3R4
902 334 1546 | info@qe2foundation.ca

Charitable Business No: 88646 3496 RR0001



QE2Foundation.ca

Transfer of Publicly Traded Securities to the QEII Foundation

DONOR INFORMATION

Donor Name:		
Phone:		
Address:		
City:	Province:	Postal Code:

BROKER INFORMATION

Name of Broker:
Brokerage Firm Name:
Phone:
Client Account #:

I request that the following investments currently held in my account at your firm to be re-registered in the name of the QEII Health Sciences Centre Foundation via its broker.

BMO Nesbitt Burns - Attn: Mark Elliott 1675 Grafton Street, 14th floor Halifax, NS B3J OE9 Tel: 902 496 1167 Toll free: 1 800 841 7993 Fax: 902 423 7011 Email: mark.elliott@nbpcd.com	FINS - # T009 Account - # 28011741-17 CUID - # NTD Broker Rep - # AHL DTC - #5043 (for U.S. Transactions only)
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SECURITIES TO BE TRANSFERRED

	Quantity	Name of Security	CUSIP#
1			
2			

Please email a copy of this transfer to the QEII Foundation's Geoff Graham at Geoff.Graham@qe2foundation.ca. Geoff can also be contacted at 902 442 7196.

Donor/Client Signature

Date