

A legacy for care close to home



Letter of Intent, Form 1 – Shares or Securities

If you donate certain publicly traded securities “in kind” to a registered public charity, including the WDMH Foundation, you can eliminate the tax on some or all of the capital gains. For convenience and transparency’s sake, it is the WDMH Foundation’s preference for you to make a donation of securities via electronic transfer from your broker to ours. Please follow the steps listed below to make your gift today, and thank you.

Name: _____

Address: _____

Phone: _____ Email: _____

☐ Yes, I would like to receive quarterly e-updates from the WDMH Foundation. (Please provide your email address in the space above)

We want your gift to have the impact you want! Please select which fund/s you want your gift directed to. If you would like more information about any of these Funds, please reach out to us or see our

WDMH Foundation Funds – Choose How Your Gift Will Be Used

WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor:

- ☐ **Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received.

WDMH Foundation Funds supporting Dundas Manor include:

- ☐ **Dundas Manor General Fund** (including the new Dundas Manor)
☐ **Dundas Manor Activity Fund**

WDMH Foundation Funds supporting Winchester District Memorial Hospital include:

- ☐ **WDMH Family Care Fund**
☐ **WDMH General Equipment Fund**
☐ **WDMH Cancer Care Fund**
☐ **WDMH Diagnostic Imaging Fund**



To:

Donor's Brokerage Firm (and FINS #)

Account Number

Street Address

City

Province/Postal Code

Brokerage Firm Contact Name

Telephone Number & Extension

Brokerage Firm Contact Email Address

I empower you, my broker, to make free delivery of the following securities from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation (Charitable Registration # 89282 4368 RR0001), to RBC Dominion Securities, Brockville ON (CUID #DOMA), Account # 504-02397-16, Dealer Code 9190-E75 Euroclear 90065 (DTC 5002).

Number of shares

Security name and ISIN

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707, or send by e-mail PDF to kathy.hunt@rbc.com.

Date

Name

Signature

I acknowledge receipt of this direction to transfer securities in-kind.

Date

Donor's Brokerage firm

Signature

In order to initiate your in-kind gift transfer, please complete this form with your broker and send a copy to Erin Kapcala either by email at ekapcala@wdmh.on.ca, by fax at 613-774-7202 or by mail to WDMH Foundation, 566 Louise Street, Winchester, ON K0C 2K0. A WDMH Foundation representative will contact you to discuss your recognition and gift designation preferences.

Typically, in order to allow sufficient time to process your gift by the end of the calendar year, transfer instructions should be provided to your broker and our broker no later than December 15. The value of the official income tax receipt will be for the value of the shares/securities when they settle into the Foundation's brokerage account, as this is when the transfer of property is deemed to have taken place.

PLEASE NOTE: In order to avoid accepting and transferring shares that cannot be liquidated (sold or transferred), please call Erin Kapcala at 613-774-2422 ext. 6769 at our office prior to submitting this form to your broker.