



MAKING A GIFT OF SECURITIES

A Step-By-Step Guide To Investing In Our Community's Health

Did you know? The most tax-efficient way to donate is through a gift of publicly traded securities. By transferring ownership of stocks, bonds, or mutual funds to the Foundation, you reduce capital gains payment and reduce your tax bill. Talk to your broker or financial planner to see if a gift of securities may be right for you. Thank you for your thoughtful generosity.

Step 1: Inform your broker, custodian, institution, or investment advisor that you wish to donate shares or mutual funds to the Victoria Hospitals Foundation (VHF).

Step 2: Complete all of the sections of the transfer form below with their assistance. Ensure that a copy is sent to our CFO, Heather Crow, heather.crow@islandhealth.ca.

Step 3: Your broker will arrange for the shares to be delivered to our custodian, RBC Phillips, Hager & North Investment Counsel.

Important: A copy of the form must be submitted to Heather Crow in order to receive a tax receipt. **To ensure you receive a 2025 tax receipt for your gift of securities, it is recommended that you initiate the transfer with your bank or broker by December 5.** This is to ensure there is enough time for the transaction to be completed and deposited into our account by December 31, 2025.

Securities are considered legally transferred only once our custodial agent, RBC Phillips, Hager & North Investment Counsel, confirms their delivery. The value of your tax receipt is based on the closing price on the date the shares are officially transferred into the Victoria Hospitals Foundation account. In accordance with our policy, VHF sells the shares as soon as possible after receipt.

Thank You For Elevating Care on Vancouver Island
VictoriaHF.ca | Charitable Registration #10793 5637 RR00011
Wilson Block, 1952 Bay St, Victoria, BC, V8R 1J8



VICTORIA HOSPITALS
FOUNDATION

Gift Of Mutual Funds Or Securities To VHF

Client/Donor Information

Name: _____ Daytime Telephone: _____

Address: _____ Evening Telephone: _____

City: _____ Province: _____ Postal Code: _____

Email: _____ I want my tax receipt: ☐ mailed ☐ emailed

Fund And/Or Broker Information & Donor Authorization

Delivering Institution/Firm: _____

Contact/Broker Name: _____ Transfer Date: _____

Contact/Broker Fax: _____ Client/Donor Account #: _____

Contact/Broker Phone: _____ CUID Code (if applicable): _____

[Name of Mutual Fund Issuer, Fund Name & Fund Number] **OR** [Name of Security]:

(i) _____ # Of Units / \$ Amount: (i) _____ / _____

(ii) _____ # Of Units / \$ Amount: (ii) _____ / _____

CUSIP (Please Complete): _____

Description & Class Of Securities: (i) _____

(eg. common, preferred, mutual fund units etc.)

(ii) _____

I wish to make a charitable gift consisting of Mutual Funds/Securities to the Victoria Hospitals Foundation (Charitable Registration #10793 5637 RR0001). Further to this, please accept this form as my authorization for you to transfer in-kind, the above listed Mutual Funds from my account to the Victoria Hospitals Foundation custody account held at RBC Phillips, Hager & North Investment Counsel (re-registration/delivery/trade settlement details below). It is my understanding that this transfer and gifting represents a disposition for which I will be provided with a donation receipt from the Victoria Hospitals Foundation. The amount of the receipt will be based on the value as of the close of trading on the date the mutual fund(s) are transferred into the name of the Victoria Hospitals Foundation or based on the value as of the close of trading on the date the securities are received by the Victoria Hospitals Foundation in the custody account.

Client Signature: _____ Name: _____ Date: _____

Transfer Information For The Victoria Hospitals Foundation (VHF)

RBC Phillips, Hager & North Investment Counsel
502-707 Fort St, 5th floor
Victoria BC V8W 3G3

Intermediary Account: #46307510-16
Intermediary (CUID) Code: DOMA
DTC#: 5002 Mutual Fund Dealer # 9190

If you have any transfer questions or concerns, please contact Abhishek Pathak at 250-953-5604, Khushali Salehkar at 250-356-3394, or Lisa Dempsey at 250-356-4790 or Lisa.Dempsey@rbc.com.

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