

Donation of Publicly Listed Securities to Broadmead Care

Thank you for donating publicly listed securities to Broadmead Care to support veterans, seniors and adults with disabilities we serve. Your donation of publicly listed securities including stocks, bonds or mutual funds can be made to Broadmead Care easily. Please follow these instructions:

1. Complete the Donations of Publicly Listed Securities – Brokerage Information form and deliver it to your broker or financial advisor with a copy to Broadmead Care. You may need your advisor's assistance to complete this form.
2. Your broker should contact our custodian, Scott Aitchison at CIBC Wood Gundy, and send both the completed form and the securities directly to him.
3. Once the securities have been transferred into Broadmead Care's brokerage account, Scott Aitchison/CIBC Wood Gundy will advise us in writing of the receipt of the securities and the closing market value on the day the securities were received into our account.
4. You will receive an official tax receipt for the value of the securities as determined by CIBC Wood Gundy.
5. It is Broadmead Care's policy that securities, once received, may be sold or added to the society's investment account in accordance with our financial policies.
6. Complete the Donor Direction form and return it to Broadmead Care.

Thank you again for enhancing the lives of the veterans, seniors and adults with disabilities that we serve. If you have any questions, please contact either:

Mandy Parker, VP Philanthropy & Communications, mandy.parker@broadmeadcare.com 250-658-3226
Rick Nelson, VP Finance & IT, Rick.Nelson@broadmeadcare.com 250-658-3210

Broadmead Care
4579 Chatterton Way
Victoria BC V8X 4Y7
www.broadmeadcare.com

**DONATION OF PUBLICLY LISTED SECURITIES
BROKERAGE INFORMATION**

Date: _____

LETTER OF AUTHORIZATION FROM DONOR TO DONOR'S BROKER:

TO: Donor's Broker (Delivering) Firm _____

Branch _____

Address _____

Name of Broker _____ Phone _____

Email _____ Fax _____

FROM:

Donor's name _____

Account # _____

Address _____

Phone _____ Email _____

**PLEASE TRANSFER THE FOLLOWING SECURITIES IN KIND TO THE
BROKERAGE ACCOUNT OF BROADMEAD CARE SOCIETY:**

_____ shares of _____
(number or dollar amount of shares) (name of company and CUSIP#, symbol or ADP code if available)

Transfer to: Broadmead Care Brokerage Account
CIBC Wood Gundy
CUID: WGDB FINS #: T079
Account: 821-04832-11
Contact: Scott Aitchison, Investment Advisor
Scott.Aitchison@cibc.ca
730 View Street 6th floor
Victoria BC V8W 1J8
Phone 250-361-2280 Fax 250-361-2270

