Donation of Publicly Traded Securities to Operation Smile Canada

Operation Smile Canada

Thank you for supporting Operation Smile Canada with a gift of securities.
Donating securities such as stocks, bonds, or mutual funds is easy and could offer you substantial tax benefits.

1. Donor Information

Name _____

Address _____

City _____ Prov. _____ Postal Code _____

Phone _____ Email _____

2. Broker Details

Company Name _____

Broker Name _____

City _____ Prov. _____ Postal Code _____

Phone _____ Donor Account Number _____

Email: _____

3. Securities to be Transferred

_____ shares of _____
# of shares *Name of security & approximate value*

_____ shares of _____
# of shares *Name of security & approximate value*

_____ shares of _____
# of shares *Name of security & approximate value*

_____ shares of _____
# of shares *Name of security & approximate value*

4. Transfer Securities in Kind to:

Receiving Institution: TD Waterhouse Canada Inc.

Account Name: Operation Smile Canada Foundation

Account Numbers: 25B7Y5A (*Canadian Securities*) | 25B7Y5B (*US Securities*)

FINS #: T007 **CUID #:** GIST **DTC #:** 5036

- ☐ I authorize this transfer as a charitable donation to Operation Smile Canada.
- ☐ I agree that Operation Smile Canada, or its agents, may contact my broker for the purpose of concluding this transaction.
- ☐ I would like my donation to be applied to the area of greatest need.
- ☐ **OR** I would like my donation to be applied to (specify): _____
- ☐ Please send my charitable tax receipt by email.
- ☐ I would like to receive periodic electronic communications from Operation Smile Canada.

_____ _____
Signature of Donor/Client Date

1. **Complete this form.** This information is needed for the transfer, tracking and receipting of your donation.

2. **Give the form to your broker.** Your broker will arrange for the transfer of shares to the Operation Smile Canada investment account. **Neither Operation Smile Canada nor our broker can initiate the transfer.** If you do not have a broker, fax this form directly to your investment firm. Your broker investment firm may have an internal form to sign as well. *If you do not have a broker, please contact Operation Smile Canada before completing the form.*

3. **Send a copy of the completed form to our broker** (or ask your broker to do this):

   TD Waterhouse Canada Inc.
   Fax: 1.877.639.4547 **AND**
   416.983.5696

4. **Please send a copy of the completed form to the Operation Smile Canada contact below** (or ask your broker to do this), **so we may ensure a donation receipt is issued for your gift.**

   Paige Melvin
   Phone: 647.952.8081
   Email: paige.melvin@operationsmile.org

Note: In accordance with CRA guidelines, the gift value will reflect the closing value of the securities on the day they are received by our account representative.

Operation Smile Canada Foundation
375 University Avenue, Suite 204
Toronto, ON M5G 2J5
Toll-free #: 844.376.4530
www.operationsmile.ca

Charitable Registration Number:
84064 3605 RR0001