



**Ronald McDonald  
House Charities®**  
Alberta

111 West Campus Place NW  
Calgary, Alberta T3B 2R6  
www.rmhcalberta.org  
CRA Charity #: 119157402 RR 0001

## CHARITABLE DONATION OF PUBLICLY TRADED SECURITIES IN KIND

### Step 1:

#### Complete this form (Pages 1 & 2)

This information is needed for the transfer, tracking and receipting.

### Step 2:

#### Give completed form to your broker

Your broker will arrange for the transfer of securities to the Ronald McDonald House Charities® Alberta ("RMHCA") investment account. RMHCA cannot initiate the transfer. If you do not have a broker, fax/email this form directly to your investment firm.

### Step 3:

#### At the same time, send a copy of the form (all 3 pages) to RMHCA:

**Attention: Gia Nutting,  
Director of Finance  
gnutting@rmhcalberta.org  
Tel: 780-439-5437 ext. 8242**

This will ensure a donation receipt is issued for your gift.

### Donor Information:

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Name of Donor(s)

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Mailing Address

City

Province

---

Postal Code

Phone Number

E-mail

### Donor Broker Information:

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Delivering Institution

Donor Account Number

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Contact Name

Contact Phone Number

Contact E-Mail

### Publicly Traded Securities to Be Transferred In Kind:

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Security Description

Symbol / CUSIP

Quantity

Approx. Value (\$)

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Security Description

Symbol / CUSIP

Quantity

Approx. Value (\$)

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Additional comments/instructions/Information

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Additional comments/instructions/Information (cont'd)

**Transfer Securities in Kind To:**

**Receiving Institution Name:** RBC PH&N Investment Counsel  
**Account Name:** Ronald McDonald House Charities Alberta Society  
**Account Number:** 46308834-13  
**CUID:** DOMA  
**DTC:** 5002  
**Contact Name:** Alexia Golden  
**Contact Phone Number:** 403-515-6839  
**Contact Phone Email:** alexia.golden@rbc.com

**Recognition:**

\_\_\_\_\_

I prefer that my gift remain anonymous and my name will not be printed on recognition materials.

A charitable tax receipt from RMHCA, will be based on the closing price of the securities on the day the securities are received in RMHCA’s brokerage account. **In order to receive a charitable tax receipt for the calendar year, the securities must be transferred to the RMHCA account no later than December 15th, of the same calendar year.** These securities have been transferred to the RMHCA without restriction.

I have read and understand the above information and authorize the transfer of the above mentioned assets to the *RMHCA*. *I also agree that the RMHCA, or its agent, may contact my broker for the purpose of concluding this transaction.*

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

**Ronald McDonald House Charities® Alberta**  
***FOR OFFICE USE ONLY***

1. Ronald McDonald House Charities® Alberta authorizes RBC PH&N Investment Counsel to sell the above securities immediately upon arrival.
  
2. Ronald McDonald House Charities® Alberta authorizes RBC PH&N Investment Counsel to:
  - Retain proceeds of sold securities in the Ronald McDonald House Charities® Alberta account at PH&N Investment Counsel.
  
  - Transfer proceeds of sold securities to the Ronald McDonald House Charities® Alberta bank account on file.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date