

Donation of Publicly Listed Securities to Greenwoods Eldercare Society

Thank you for your interest in donating securities to the Greenwoods Eldercare Society. A gift of publicly listed securities, such as stocks, bonds or mutual funds can be made to Greenwoods. Please follow these instructions 1-5 here below, to transfer securities as a donation:

FORM 1 and SECURITIES TRANSFER

1. **Please fill out and send Form 1 “Donor(s) Instructions to Donor’s Broker” (see page 2) to your broker** with a copy to: Executive Director, Aletha Humphreys:
alethahumphreys@greenwoodseldercare.org or by mail to:
Greenwoods Eldercare Society, 133 Blain Road, Salt Spring Island, BC, V8K 1Z9.
2. Have your broker send the filled copy of Form 1, and the securities, directly to our Investment Advisor Joni Ganderton at BMO Nesbitt Burns (address on form).
Account 81030775-10.
 - a. You may need your broker’s assistance to complete Form 1.
 - b. Please give your broker permission to release your name to BMO Nesbitt Burns and Greenwoods Eldercare Society (see bottom of Form 1).
 - c. Once the securities have been transferred to Greenwoods' brokerage account, BMO Nesbitt Burns will advise Greenwoods Eldercare in writing of the receipt of the securities and the closing market value on the day the securities were received into our account.

FORM 2 and TAX RECEIPT

3. **Please fill out and send Form 2 “Donor(s) Direction to Greenwoods Eldercare Society” (see page 3) to the Executive Director, [Executive Director, Aletha Humphreys: alethahumphreys@greenwoodseldercare.org](mailto:alethahumphreys@greenwoodseldercare.org)**
Or, by mail to:
Greenwoods Eldercare Society, 133 Blain Road, Salt Spring Island, BC, V8K 1Z9.
4. Greenwoods Eldercare Society will issue an official receipt to the donor(s) for income tax purposes, for the value as determined by BMO Nesbitt Burns.
5. It is Greenwoods' policy that securities, once received by Greenwoods, may be sold or added to the Society's investment account in accordance with the Society's investment policies.

QUESTIONS? Please call us at 250-537-5561.



FORM 1: Donor(s) Instructions to Donor's Broker

Date _____

Donor's Broker's Firm Name: _____

Branch _____

Address _____

Individual Name of Broker _____ Phone _____

Email _____ Fax _____

Broker Account # _____

Donor Address _____

Donor Phone _____ Donor email _____

Donor's Name (optional) _____

I permit the release of my name to BMO Nesbitt Burns and Greenwoods Eldercare Society.

With a copy of this form, please transfer the following securities in kind to Account 81030775-10. BMO Nesbitt Burns, located at 152A Fulford Ganges Road, Salt Spring Island, BC, V8K 2T8. Contact: Joni Ganderton, Investment Advisor. Ph: 250-537-1654. Email: joni.ganderton@nbpcd.com

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

Signature of Donor _____



FORM 2: DONOR(S) DIRECTION TO GREENWOODS ELDERCARE SOCIETY

Date _____

THIS TRANSFER OF SECURITIES IS A CHARITABLE DONATION TO GREENWOODS ELDERCARE SOCIETY: Charitable Registration #107457731 RR0001

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

_____ shares of _____
(Number or dollar amount of shares) (Name of security)

Donor Name _____

Donor Name #2 (if applicable) _____

Please use this Donor Name for the tax receipt:

Donor Address _____

Donor Phone _____ Donor email _____

Please categorize this donation as a permanent gift to the Greenwoods Eldercare Society

I wish my donation to be designated to: (if applicable)

Please list this donation as "Anonymous" in any Greenwoods Eldercare Society publications OR

Please acknowledge the Donor Name(s) in any Greenwoods Eldercare Society publications

Signature of Donor _____