

## Procedure for Marketable Securities

The Lung Health Foundation is pleased to accept donations of marketable securities (stocks, bonds and mutual funds) that are traded on a recognized stock exchange. To assist you in completing your gift-in-kind, please complete this form and follow the two steps below.

### Contact Your Personal Broker:

1. To give instructions to your broker to enact an electronic transfer of securities from your account to the brokerage account for the Lung Health Foundation. Your broker will then contact the Lung Health Foundation's broker directly to enact the transfer.
2. To provide your broker with the following Receiving Institution & Account Information:

**Receiving Institution:** TD Direct Investing, 77 Bloor St. West, PO Box 5999, Station F, Toronto, ON , M4Y 2T1, Telephone: 1-800-465-5463

**Account Name:** Ontario Lung Association (operating as the Lung Health Foundation)

**Registration #:** 12404 6368 RR0002

**Bank Account Number:** 79-3RX5-A

### Please Complete, Sign, and Return This Form:

- By email: [lkopvillem@lunghealth.ca](mailto:lkopvillem@lunghealth.ca)
- By fax: (416) 864-9916, Attn: Leiki Kopvillem, Manager, Donor Stewardship & Community Giving

Description of Securities: \_\_\_\_\_

Quantity: \_\_\_\_\_ shares Donor Address: \_\_\_\_\_

Approx \$ Value of Shares: \_\_\_\_\_ City: \_\_\_\_\_

Your Broker: \_\_\_\_\_ Province: \_\_\_\_\_

Broker Phone #: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Donor Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Donor Phone #: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** A charitable receipt for income tax purposes will be issued by the Lung Health Foundation to reflect the closing price of the shares on the day they are received in the Lung Health Foundation's account in negotiable form. Please call 437-243-7138 for additional information.

***Thank you for your generosity.***