

HOW TO DONATE SHARES AND SECURITIES TO THE WDMH FOUNDATION



Expanding the circle
of compassionate care
LET'S BUILD THE NEW DUNDAS MANOR.

Whether the securities are held as paper certificates, or in a brokerage account, it is important to know that the ownership of the shares must be transferred to us. You/your broker cannot sell them first in order to realize the tax benefits of donating shares to the WDMH Foundation.

1. To transfer securities electronically, please complete "Letter of Intent, FORM 1" with your broker, and give copies to your broker as well as the WDMH Foundation.
2. Your broker should contact and deliver the form and transfer the securities to our agent, RBC Dominion Securities
Account of: WDMH Foundation
Receiving Institution: RBC Dominion Securities Inc.
Contact: Kathy Hunt, CIM, FMA, FCSI, Portfolio Manager
Phone: 613-345-7074 OR Toll-Free: 1-800-567-0533 Fax: 613-345-7707
Email: kathy.hunt@rbc.com
3. The Foundation will be advised by RBC Dominion Securities once the securities have been transferred to the brokerage account.
4. The value of the official income tax receipt will be for the value of the shares/securities when they settle into the Foundation's brokerage account, as this is when the transfer of property is deemed to have taken place. Donated securities will be sold immediately by the Foundation, as stated in the investment policies of the Foundation.
5. Securities that are held within a trust or held in dividend reinvestment plans may require the additional step of certificating the stock in your name before the transfer can be completed to the WDMH Foundation.
6. If you hold share certificates in paper form, please endorse each one of the shares or make them payable to the WDMH Foundation. Please send the shares by courier, or deliver in person, directly to the Foundation office, located in the lobby of Winchester District Memorial Hospital. The Foundation will then send the shares on to its Investment Broker. Please note, the printed shares must still be submitted with the "Letter of Intent, FORM 1" described above.

WDMH Foundation
566 Louise Street
Winchester, Ontario
K0C 2K0

WDMH Foundation Charitable Registration Number: 892824368 RR0001



Fundraising for Excellence.
Dundas Manor Long-Term Care Home
Winchester District Memorial Hospital



How to Make a Gift of Shares or Securities

If you donate certain publicly traded securities "in kind" to a registered public charity, including the WDMH Foundation, you are now exempt from the payment of capital gains tax on any profit created by the fair market value of the donation, thanks to a change in regulations in 2006 by the Federal Government of Canada. For convenience and transparency's sake, it is the WDMH Foundation's preference for you to make a donation of securities via electronic transfer from your broker to ours. Please follow the steps listed below to make your gift today and thank you.

LETTER OF INTENT, FORM 1

In order to initiate your in-kind gift transfer, please complete this form with your broker and send a copy to Erin Kapcala by either email at ekapcala@wdmh.on.ca, by fax at 613-774-7202 or by mail to: WDMH Foundation, 566 Louise St, Winchester, ON K0C 2K0.

Typically, in order to allow sufficient time to process your gift by the end of the calendar year, transfer instructions should be provided to your broker and our broker no later than December 15th.

The value of the official income tax receipt will be for the value of the shares/securities when they settle into the Foundation's brokerage account, as this is when the transfer of property is deemed to have taken place.

A WDMH Foundation representative will contact you at the telephone number given below to discuss your recognition and gift designation preferences.

PLEASE NOTE: In order to avoid accepting and transferring shares that cannot be liquidated (sold or transferred), please call Erin Kapcala at 613-774-2422 ext. 6769 at our office prior to submitting the following form to your broker.

Direction to Transfer Securities In-Kind Electronically for Donation

Contact Information for Donor (*required information)

*First Name *Last Name

*Street Address (Including PO Box, if applicable)

*City

*Province

*Postal Code

*Preferred Daytime Phone Number

Email Address

**Please direct my gift to the Dundas Manor Redevelopment Fund
–For a new and vibrant Dundas Manor Long-Term Care Home**

Donor initial _____

To:

 Donor's Brokerage Firm (and FINS #) Account Number

 Address City Province/Postal Code

 Brokerage Firm Contact Name Telephone Number & Extension

 Brokerage Firm Contact Email Address

I empower you, my broker, to make free delivery of the following securities from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation (Charitable Registration # 89282 4368 RR0001), to:

RBC Dominion Securities, Brockville, ON (CUID #DOMA)
 Account # 504-02397-16
 Dealer Code 9190-E75
 Euroclear 90065 (DTC 5002)

Number of Shares	Security name and ISN
_____	_____
_____	_____
_____	_____
_____	_____

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707 or send by e-mail PDF to kathy.hunt@rbc.com.

 Date Name (please print) Signature of Donor

 Date Name (please print) Signature of Donor

I acknowledge receipt of this direction to transfer securities in-kind.

 Donor's Brokerage

 Firm Signature

 Date

