

## **Gifts of Publicly Traded Securities to JDRF (Juvenile Diabetes Research Foundation)**

**Thank you for considering a gift of securities to JDRF. Through your generosity, you are making a significant contribution toward helping JDRF accelerate the pace of research to cure, better treat, and prevent T1D.**

Transferring your securities directly to JDRF is simple and tax smart. When you make a gift of publicly traded securities to JDRF, you receive a charitable tax receipt for the fair market value of the security and you do not pay tax on any capital gain.

**The following steps will ensure your donation of securities, whether stocks, bonds or mutual funds, is received and processed in a timely and accurate manner:**

1. **Complete the following “Letter of Authorization from Donor to Broker - Securities Transfer Form”** (below). This form instructs your broker to transfer your securities to JDRF. Please complete all sections of the form, especially the CUSIP number that can be used by your broker to track the transaction.  
(Your broker or financial advisor can assist you with completing this form.)

2. **Please ensure you or your broker submits a copy of the completed transfer form to JDRF, prior to transferring securities to our account, to:**  
Marianne Chant, Vice President Support Services & CFO, T: 647.789.2006 TF 1.877.287.3533 ext. 2006  
Fax: 416.491.2111, Email: [mchant@jdrf.ca](mailto:mchant@jdrf.ca)

This step is important because, for privacy reasons, your broker cannot disclose your name to us when your securities are transferred to JDRF’s account. Notifying us will ensure you receive your official receipt for income tax purposes and will allow us to thank you and recognize your generosity in a timely and appropriate manner.

3. **Fax or send the completed transfer form to your broker** who will initiate, and be responsible for, the transfer. Your broker will then submit the form and your securities to our custodial agent, RBC Direct Investing Inc. and advise us in writing of the receipt of the securities and related details.
4. **We will issue you a donation receipt** based on the closing price on the date your securities were transferred to the JDRF account at our custodial agent, in accordance with our Board Policy and Canada Revenue Agency Regulations.

**Questions:** Please contact Marianne Chant, T: 647.789.2006 TF 1.877.287.3533 ext. 2006  
Email: [mchant@jdrf.ca](mailto:mchant@jdrf.ca).

### **THANK YOU FOR YOUR GIFT**

Shares are considered legally transferred only when our custodial agent, RBC Direct Investing Inc., confirms delivery. JDRF policy for the sale of donated securities is that all shares be sold as soon as possible after they have been received.

Charitable Registration Number: 11897 6604 RR0001



## Letter of Authorization from Donor to Broker Securities Transfer Form

To transfer securities to JDRF (Juvenile Diabetes Research Foundation), please ensure the following form is completed and provided to your broker and JDRF.

### A. DONOR INFORMATION (Required for tax receipting purposes)

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### B. BROKER INFORMATION

Financial Institution \_\_\_\_\_ Contact Name \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Account Name \_\_\_\_\_ Client Account Number \_\_\_\_\_

### C. DESCRIPTION OF SECURITIES & DONOR AUTHORIZATION

This letter confirms my intention to donate free and clear the following securities to Juvenile Diabetes Research Foundation:

Security Name	# of shares/units	CUSIP# / Market Symbol
_____	_____	_____
_____	_____	_____

Security Name	# of shares/units	CUSIP# / Market Symbol
_____	_____	_____

*(Your broker will be able to provide you with the CUSIP number.)*

Transfers are to be made to: Account Transfers Department, RBC Direct Investing Inc.  
200 Bay Street, Toronto, ON M5J 2Z5  
Fax: 1-888-722-2388  
Account No. 68742180-16      FINS#: T002      CUID: DOMA      DTC: 5002

Date: \_\_\_\_\_ Donor's Signature: \_\_\_\_\_

**THANK YOU FOR YOUR GIFT**

Charitable Registration Number: 11897 6604 RR0001