



Donor Confirmation Form – Publicly Traded Securities

Donor Information To be completed by the donor or a Foundation representative.

1	Last Name _____	2	First Name _____
3	Address _____		
	City _____	Province _____	Postal Code _____
	Tel.: () _____	Fax: () _____	Email: _____
5	Tax receipt to above name? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, in whose name? _____		
	Receipt sent to address above? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where? _____		
6	Broker Name _____	7	Delivering Broker CUID _____
8	Brokerage Firm _____		
9	Address _____		
	City _____	Province _____	Postal Code _____
10	Tel.: () _____	Fax: () _____	Email: _____
11	Quantity of securities: _____	12	Securities (Including CUSIP #) _____
	_____		_____
	_____		_____
13	Transfer date	/ /	
14	Reason for donation (optional) _____		

15	Donor signature _____	Date	/ /

Montreal Heart Institute Foundation Custodian

Montreal Heart Institute Foundation Investment Custodian:		National Bank Trust	
Address 1100, University, 12 th Floor, Montreal (Quebec) H3B 2G7			
National Bank Trust CUID	NBCS	Transfer Date to Custodian	/ /
Transfer to MHIF Account : _____			

Confirmation of Reception of Securities To be completed by Custodian and faxed or emailed to the MHIF.

Qty of securities transferred	_____	Securities	_____
Value of securities	_____	Reception	Date / / Hour /

For Use by the Montreal Heart Institute Foundation

Contact date with donor : / /		– Reception date from investment manager : / /	
initials	Custodian copy	initials	Accounting copy
initials	Delivering Broker copy	initials	Donor file copy
initials	Investment Manager copy	initials	Database entry copy
		initials	Letter to donor / /

Transfer Procedure

- Please complete sections 1 to 15.
 - Authorize the Delivering Broker to transfer the securities to the MHIF Custodian.
 - Email this form to joanne.mcdonald@icm-mhi.org or fax it at 514-376-5400.
 - A Foundation representative will contact you to complete the form and authorize the MHIF Custodian to receive the publicly traded securities.
 - Transfer will occur at the date specified in section 13.
- * For more information, please contact Johanne McDonald, Montreal Heart Institute Foundation Director of Development and Communications, at 514 376-3330 ext. 2205.