

Donation of Publicly Traded Securities to South Okanagan Similkameen Medical Foundation

Thank you for your interest in donating securities to the South Okanagan Similkameen Medical Foundation. A gift of publicly-traded securities, such as stocks, bonds or mutual funds, can be made to the Foundation. Transferring securities is very easy to do. Simply follow these directions:

1. Complete the attached form (you may need your broker's assistance) and deliver it to your broker or financial advisor with regard to your wish to make a gift of securities to South Okanagan Similkameen Medical Foundation.
2. Your broker should contact and deliver the form to our agent, CIBC Wood Gundy.

For account of:	South Okanagan Similkameen Medical Foundation
Account Number:	825-0470419
Contact:	James Beaumont
Email:	James.Beaumont@cibc.ca
Phone:	(250) 770-2117

3. Once the securities have been transferred to the Foundation's brokerage account, CIBC Wood Gundy will advise us of the receipt of the securities and the closing bid value on the day the securities were received into our account.
4. We will issue an official receipt to you, for income tax purposes, for the value as determined by CIBC Wood Gundy.
5. It is the Foundation's policy that securities, once received by the Foundation or its broker will be sold in accordance with the Foundation's policy.

Thank you again for helping us to preserve the quality of health care delivery in the South Okanagan Similkameen. If you have any questions or concerns, please do not hesitate to call:

Ian Lindsay, CEO
250-492-9027
ian.lindsay@interiorhealth.ca

Mailing Address:
South Okanagan Similkameen Medical Foundation
550 Carmi Ave.
Penticton BC V2A 3G6

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In order to initiate your gift transfer, please complete this form with your broker (the delivering custodian). Your broker will be able to provide the CUSIP and FINS numbers.

Please ask your broker to send this form to:

**James Beaumont, CIBC
Wood Gundy
james.beaumont@cibc.ca**

AND TO:

**Ian Lindsay, SOS Medical
Foundation:
ian.lindsay@interiorhealth.ca**

CIBC Wood Gundy must receive the securities in its account before the securities can be valued and a charitable tax receipt issued.

*For additional information about making a gift of securities please contact
**Ian Lindsay, CEO
ian.lindsay@interiorhealth.ca***

Name and Contact Details of Donor's Broker/Delivering Custodian (DC)

TO: _____
Name of Donor's Brokerage/Delivering Custodian

Attention: _____
Name of Contact Person at Donor's Brokerage/Delivering Custodian

FINS#: _____ Phone (____) _____ Fax: (____) _____
(Broker/DC to complete)

Client Account Number: _____

Donor/Client Information

FROM: _____
Name of donor / client for charitable tax receipting purposes

Full Address: _____

Telephone: (____) _____

Instructions from Donor to Donor's Broker/DC

I hereby give authority to deliver free as a charitable gift the following securities **to CIBC Wood Gundy (CUID# WGDB) to the attention of James Beaumont** for credit to account # 825-04704-19 in the name of South Okanagan Similkameen Medical Foundation. Please deliver free:

Full Name of Security: _____ CUSIP #: _____
(Broker/DC to complete)

Market Symbol: _____ Number of Shares/Units to transfer: _____
(Donor or Broker/DC to complete)

Authorization of Donor / Client

Signature day month year

Gift Designation Instructions from Donor to SOS Medical Foundation

Please use my gift as follows:

Greatest Need
or

Specific Fund or Purpose: _____
(please specify)