

## GIFTS OF PUBLIC SECURITIES

### Process to transfer public securities electronically to The Arthritis Society

**Step 1:** Complete the share transfer form (attached), and submit—**prior** to the transfer—by email, fax or regular mail to:

**Sandra Dow**

Vice President, Philanthropic Giving

Email: [sdow@arthritis.ca](mailto:sdow@arthritis.ca) Fax: **416.979.8366**

Tel: 416.979.3353 ext 3343

Toll-free: 1.844.979.7228

or

**Sumaiya Moosa**

Planned Giving Specialist

Email: [smoosa@arthritis.ca](mailto:smoosa@arthritis.ca) Fax: **416.979.8366**

Tel: 416.979.3353 ext 3553

Toll-free: 1.844.979.7228

The Arthritis Society

393 University Avenue, Suite 1700, Toronto, ON M5G 1E6

**Step 2:** Complete the Letter of Authorization, addressed to your broker (attached). This authorizes the electronic transfer into The Arthritis Society's brokerage account. Return the Letter of Authorization to The McCutcheon Group – Richardson GMP Limited:

**Fred McCutcheon or Dale McCutcheon**

The McCutcheon Group – Richardson GMP Limited

145 King Street West, Suite 500, Toronto, ON, M5H 1S8

Email: [TheMcCutcheonGroup@RichardsonGMP.com](mailto:TheMcCutcheonGroup@RichardsonGMP.com) Fax: **416.864.9888**

Tel: **416.941.6746**, Toll-free: **1.866.263.0818**

*Please note:* If you have hardcopy share certificates, please contact The Arthritis Society's Planned Giving Department listed above for further instructions.

**Step 3:** The Arthritis Society will issue a tax receipt that reflects the closing price of the shares on the date of transfer. This is the date the shares arrive in The Arthritis Society's brokerage account.

### The Arthritis Society account information:

Canadian side of account: 400–D050–A

U.S.-dollar side of account: 400–D050–B

CUID (use instead of FINS): GMPT

DTC: 5016 – for U.S. security transfers

Transfers department contact: Rosie Jackson

## GIFTS OF PUBLIC SECURITIES to The Arthritis Society

### Share Transfer Form

*In order to* ensure your transaction is handled smoothly and efficiently, please submit this completed form—**prior** to the transfer—by email, fax or regular mail to:

**Sandra Dow**

Vice President, Philanthropic Giving

The Arthritis Society, National and Ontario Division

393 University Avenue, Suite 1700, Toronto, ON M5G 1E6

Email: [sdow@arthritis.ca](mailto:sdow@arthritis.ca) Fax: 416.979.8366

Tel: 416.979.3353 ext 3343 Toll-free: 1.844.979.7228

Name:	Telephone:
Address:	
Broker's name:	Telephone:
Brokerage firm:	
Broker's account:	
Name of security:	
Description of Shares (e.g., common, preferred, etc.)	
Approximate value of each share: \$	Number of shares transferred:

*I understand that I will receive a gift-in-kind tax receipt from The Arthritis Society for the closing price, on the date of transfer to The Arthritis Society. This is the date the shares arrive in The Arthritis Society's brokerage account. These securities have been donated to The Arthritis Society without restriction and can be sold by The Arthritis Society at any time considered appropriate.*

Signature of Donor:

Date:

## GIFTS OF PUBLIC SECURITIES to The Arthritis Society

### Letter of Authorization

Send your Letter of Authorization to:

**Fred McCutcheon or Dale McCutcheon**

The McCutcheon Group – Richardson GMP Limited

145 King Street West, Suite 500, Toronto, ON, M5H 1S8

Email: [TheMcCutcheonGroup@RichardsonGMP.com](mailto:TheMcCutcheonGroup@RichardsonGMP.com) Fax: **416.864.9888**

Tel: **416.941.6746**, Toll-free: **1.866.263.0818**

*The Arthritis Society account numbers:*

Canadian side of account: 400-D050-A

U.S.-dollar side of account: 400-D050-B

CUID: GMPT

DTC: 5016 – for US security transfers

Date: \_\_\_\_\_

Your broker's name: \_\_\_\_\_

Your broker's address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

This letter will confirm the authorization to transfer \_\_\_\_\_ of my shares of

\_\_\_\_\_ to Richardson GMP Limited,

account # \_\_\_\_\_, in the name of The Arthritis Society.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_