

**GIFT OF PUBLICLY TRADED  
SECURITIES FORM**



Donation of publicly traded securities may be made to your donor-advised fund at Health Partners International of Canada. Securities are received by iA Private Wealth and are valued at the closing trading price of the trading day on which the securities are received in CPM Investment Account. A tax receipt will be issued in this amount.

**Please complete this form with your broker and, prior to making the transfer, send a scanned copy to [jtabet@hpicanada.ca](mailto:jtabet@hpicanada.ca).**

**Name of Donor:**

Street Address:

City:

Province:

Postal Code:

Telephone:

E-mail address:

**Name of Broker:**

Broker's Telephone Number:

Brokerage Company:

Account Number:

Name of securities (attach list if necessary):

Number of shares or face value of the bonds or coupons:

Description of securities (e.g., common, preferred, debentures, etc.):

**Broker: Please transfer the securities to:**

Receiving Institution:

IA Private Wealth Inc.  
522 University Ave, 7<sup>th</sup> Floor  
Toronto, ON M5G 1Y7

Client Service Representative:

John Tabet (Lara Huska – Executive Assistant)

Phone:

(905) 842-8288 Ext 221

Fax:

(905) 842-5635

Dealer:

7923

CUID #:

NBCS

DTC #:

5008

Investment Account:

37D1WKA (for CAD\$ securities)

Donor's Signature

Date

**Health Partners International of Canada**

HPIC is a Public Foundation and Registered Canadian Charity #0750976-09

<https://www.hpicanada.ca/>

Email: [jtabet@hpicanada.ca](mailto:jtabet@hpicanada.ca)