

Letter of Direction for Transfer of Publicly Traded Securities or Mutual Funds

Please fill in the information and submit to your broker AND email a copy to community@wingkei.org.

Donor's information

Name			
Address			
Telephone #		Email	

Broker's information

Firm Name			
Account #			
Advisor's name			
Telephone #		Email	

Securities to be donated

Description		Code	
# of Shares/Units			
For Wing Kei use only Donation Designated to			

Transfer Securities in kind to

Receiving Institution Name	TD Direct Investing		
Account # CUID or DTC	<u>Canadian \$ Securities</u> 241WM1A GIST	<u>U.S. \$ Securities</u> 241WM1B 5036	
Account Name	Chinese Christian Wing Kei Nursing Home Association		
Charity Registration #	897773297RR0001		

I have authorized the transfer as a 'Donation in Kind' from my account to Chinese Christian Wing Kei Nursing Home Association.

Signature of Donor	Printed Name	Date

Frequently Asked Questions:

1. How to make a Publicly Traded Securities or Mutual Funds donation?

- a. Fill out the Letter of Direction for Transfer of Publicly Traded Securities or Mutual Funds
 - Email a copy of the form to Wing Kei via community@wingkei.org
 - Bring the copy of the form to your broker
- b. Fill out any other form(s) required per your broker to transfer the securities from your account to Wing Kei's account

2. Your Donation Receipt

- a. The value of the donation receipt is based on the closing price of the securities on the day the securities are received by Wing Kei.
- b. Donation receipts will be sent to your email. If an email is not present, the donation receipt will be mailed to the address provided.

3. How long will the transfer take?

- a. Typically, most stock transferred will be completed in about 5-7 business days. Other securities such as mutual funds can take longer, and is usually completed in 5-10 business days.

4. What securities are accepted by Wing Kei?

- a. Wing Kei accepts publicly traded securities from major North American exchanges, such as but not limited to: the Toronto Stock Exchange (TSX), New York Stock Exchange (NYSE) and NASDAQ. If you are unsure, please email community@wingkei.org for confirmation prior to submitting the Letter of Direction.

5. Where can I designate my donation towards?

- a. There are a range of options to designate your donation, including:
 - General Donation (area of greatest need)
 - Capital Campaign
 - In Memory/Honour of an individual
 - Event Fundraiser (e.g. Walk for Wing Kei, Charity Golf)
 - Staff Appreciation
 - Donor Walls
 - Others (please specify in the form)