

# DOCTORS WITHOUT BORDERS/MÉDECINS SANS FRONTIÈRES (MSF) GIFT OF STOCKS AND SECURITIES INTENTION FORM

In order for MSF to issue a tax receipt for this donation, a copy of this form must be sent by email or mail to Médecins Sans Frontières/Doctors Without Borders (MSF) Canada.

Email: [securities@toronto.msf.org](mailto:securities@toronto.msf.org)

Address: 2nd floor, 551 Adelaide St W Toronto, ON M5V 0N8 Canada

Phone Number: 647-577-8058

Fax Number: 416-963-8707

## PLEASE MAKE TRANSFERS TO THIS ACCOUNT:

SCOTIAMCLEOD ACCOUNT # 825-59987-11

DIRECT TRANSFER CODE (DTC) # 5011

FINANCIAL INSTITUTION CODE # T085

DEALER CODE # 9155

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Kindly note the **minimum** processing times;

Equities: 2 weeks

Commonly traded Mutual funds: 4 weeks

**Important:** For end of year transfers, processing times are longer. Refer to #4 in Terms & Conditions on the following page

Note that MSF cannot initiate a transfer of shares. The transfer must be initiated by the shareholder themselves or through a broker. This intention form is for receipting purposes only.

## THIS TRANSFER IS COMING FROM THE ACCOUNT OF:

FIRST NAME \_\_\_\_\_ LAST NAME \_\_\_\_\_

DONOR'S ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

DONOR PHONE \_\_\_\_\_ DONOR E-MAIL \_\_\_\_\_

BROKER NAME \_\_\_\_\_ FINANCIAL INSTITUTION \_\_\_\_\_

BROKER PHONE \_\_\_\_\_ BROKER E-MAIL \_\_\_\_\_

DONOR ACCOUNT # \_\_\_\_\_ BROKER CUID # \_\_\_\_\_

## THE SECURITIES TO BE TRANSFERRED IN KIND:

NAME OF SECURITY \_\_\_\_\_ NUMBER OF UNITS \_\_\_\_\_ SECURITY CUSIP # \_\_\_\_\_

APPROXIMATE DATE OF TRANSFER \_\_\_\_\_ TICKER/SYMBOL \_\_\_\_\_

A charitable tax receipt will be issued for the fair market value of the securities on the close of the day the transfer is received by MSF. This completed Intention Form confirms my intention to donate the stated securities to MSF Canada.  
Kindly review the Terms and Conditions prior to submitting.

DONOR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

# TERMS AND CONDITIONS

## The Intention Form

The Gift of Stocks and Securities Intention Form details all our account information so that your broker can initiate the transfer.

Sending us this form does not initiate the transfer of stock, as we cannot initiate it for you. You must contact your broker or self-administer the stock.

Completing this form allows us to correctly attribute the gift and ensures that the transfer process is as smooth as possible. Without a complete form we are unable to issue a tax receipt as per our policy. If a form is not received with your gift, we will identify the gift as Anonymous.

## Completing the Intention Form

**Section: Please make transfers to this account** – This section includes MSF’s account information ScotiaMcLeod. Please use this information when initiating a transfer of stocks and securities. Note that MSF cannot initiate a transfer of shares. The transfer must be initiated by the shareholder themselves or through a broker. This intention form is for receipting purposes only.

**Section: This transfer is coming from the account of** – Please fill this section with your information and your broker’s information. This section allows us to issue a tax receipt to the correct name and address once we receive the shares. It also allows us to contact you, your broker, or your financial institution if there are any issues. Note that we cannot contact your broker to initiate the transfer on your behalf. If you are administering the transfer yourself using a self-service such as TD or RBC Direct Investing, Questrade, Scotia iTrade, BMO InvestorLine, CIBC Investor’s Edge, etc., simply fill the relevant information in the broker section. You can leave the other fields in this section blank, but please make sure to provide at the very least the name of the institution or service you are using and their contact number.

**Section: The Securities to be transferred in kind** – Please fill this section with the information about the securities you will be transferring to our account including the name, number of shares, and approximate date of transfer. This section allows us to match the shares to your name once we receive them.

## Tips, Tricks, and Fine Print

- 1. Selling the shares**  
Once we receive the shares, we will sell them immediately. It is against our policy to hold on to shares.
- 2. Receipts**  
Once we receive the shares, we will send you a receipt for their value. Please expect a delay of 2 weeks for equities, and 4 weeks for mutual funds, before receiving your receipt while we process the gift. The value of the shares on the receipt will be the value of the day they were received in our account regardless of any delay with receipting.
- 3. Self-Administered Transfers**  
If you are using a self-service trading platform like TD or RBC Direct Investing, Questrade, Scotia iTrade, BMO InvestorLine, CIBC Investor’s Edge, etc., please expect delays as it often takes these institutions longer to initiate the transfer. You may notice that your platform or institution has their own form for you to fill. Do not send the MSF Intention form to these institutions. The best thing to do is to fill both forms and send them separately.
- 4. End of Year Transfers**  
The volume of transfers in November and December from our generous supporters is very high. Please take into account holiday closures in the Toronto Stock Exchange (TSX) and US stock exchanges (NYSE, NASDAQ) and initiate your transfer as soon as possible. Given these external closures and delays with processing times, any transfers of commonly traded mutual funds initiated after **November 30th**, or equities initiated after **December 15th** cannot be guaranteed a tax receipt dated that year.
- 5. Specific Requests**  
Unrestricted donations enable MSF to carry out our programs around the world. If we cannot honor a specific request, we will reallocate your donation to where the needs are greatest.

Thank you for your generous support for MSF. If you have any questions, please feel free to reach out. We are here to support you in any way we can.

Email: [securities@toronto.msf.org](mailto:securities@toronto.msf.org)

Address: 2<sup>nd</sup> floor, 551 Adelaide St W Toronto, ON M5V 0N8 Canada

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