

Gift of Securities Donation Form

Donor's Contact Information:

Your Name:		
Address:		
City:	Province:	Postal Code:
Email Address:		Telephone:

Information about your broker:

Broker's Name:	Financial Institution Name:
Broker's Phone Number:	Account Name:
Broker's Email Address:	Account Number:
DCT#:	CUID#:

Description of Securities:

Quantity	Symbol/CUSIP #	Security Description

Account information for the Canadian Institute for Advancements in Mental Health (IAM) Brokerage:

Name of Institution: Credential Securities c/o Connor, Clark & Lunn Private Capital Inc.

DTC#: 5083 **CUID#:** CRED

Account Name: Canadian Institute for Advancements in Mental Health

Account Number: 523326A1

Donor Signature: _____ Date: _____

Canadian Institute for Advancements in Mental Health

95 King St E, Suite 300, Toronto ON M5C 1G4

TEL. 1.800.449.6367 • FAX. 416.449.8434 • E-MAIL. info@iamentalhealth.ca • www.iamentalhealth.ca

Charitable Registration #12990 4058 RR 0001 • canada.ca/charities-giving

Complete your donation in 3 simple steps

1. **Please complete all sections of this form**, it is imperative to fill in the CUSIP# which will be provided by your broker or investment advisor. This number serves as a transaction number in case the transfer needs to be tracked.
2. **Send a copy of completed form to your broker.** Your broker will make arrangements for the electronic transfer of shares to the Canadian Institute for Advancements in Mental Health (IAM) broker:

Name of Institution: Credential Securities c/o Connor, Clark & Lunn Private Capital Inc.

DTC#: 5083 **CUID#:** CRED

Account Name: Canadian Institute for Advancements in Mental Health

Account Number: 523326A1

Direct broker to broker inquiries to:

Ryan A. McNerney, CIM®

Vice President & Portfolio Manager

Connor, Clark & Lunn Private Capital Ltd.

Direct: 416-862-6309

Cell: 416-843-3577

Email: rmcnerney@cclgroup.com

Email: mcnerneyclientservices@cclgroup.com

3. **Send a completed and signed copy of this form to IAM:**
For privacy reasons, securities are transferred anonymously from the broker therefore, it is important to notify IAM to ensure that your gift is properly acknowledged and to receive your tax receipt for income tax purposes. Please send a completed copy of this form to:

Attn: Richard Vajda

Canadian Institute for Advancements in Mental Health

300-95 King St. E.

Toronto, ON M5C 1G4

Email: info@iamentalhealth.ca

Phone: 416-449-6830

Toll Free: 1-800-449-6367

Fax: 416-449-8434

Please be advised that the value of the donation receipt will be based on the closing price of the shares on the day the securities are received by IAM's custodian, Credential Qtrade Securities Inc. Tax receipts for gifts of securities reflect the date the securities are received in IAM's account.

Thank you for investing in IAM's work

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