



Institute for
Advancements in
Mental Health

300-95 King St. E.
Toronto, ON M5C 1G4

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

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

Account Name: Institute for Advancements in Mental Health

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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 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: 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: mcneryclientservices@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: Donna Thompson

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



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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 with and for people living with mental illness.

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