



**\*\*Please download this form before entering your information\*\***

## Donation of Securities Form

At the Humane Society of Oakville, Milton & Halton (HSOMH), we are very grateful for your gift of securities. Please note that under current tax regulations, donations of publicly traded securities and mutual funds are only exempt from capital gains tax when you transfer them in kind. A charitable donation receipt for income tax purposes will be issued based on the fair market value of the securities on the date (closing price) the securities are received in HSOMH's brokerage account.

Instruct your broker to complete this form and email to:

- Lukas Fleck, lfleck@pwlcapital.com | Tel: 613-237-5544 ext. 318
- Ben Nguyen, HSOMH Finance Manager: bnguyen@hsomh.ca | Tel: 905-845-1551 x 111 | Fax: 905-845-1973

Your broker and our broker will complete the transfer. Modest commission charges to the broker may apply depending on the value of the shares, however the receipt value will not be impacted.

For questions about the transfer process, please do not hesitate to contact Ben Nguyen.

### A. INFORMATION ABOUT YOU

First Name:		Last Name:	
Address:		City:	Province:
		Postal Code:	
Phone Number:		Email:	

### B. DESCRIPTION OF SECURITIES

Broker's Name:		Financial Institution:	
Investment Account Number:		Broker's Phone:	Broker's Email:
Name of Securities:		# of Shares/Units:	
Date of Transfer:			

### C. SECURITIES BEING TRANSFERRED TO

<b>Account Name:</b> Oakville & Milton Humane Society <b>Account #:</b> 41MC9MA <b>Dealer Code:</b> 9822   <b>Rep Code:</b> WPLF <b>CRA #:</b> 11906 4350 RR0001	<b>NBF Inc. (NBIN Division)</b> ACCOUNT TRANSFERS DEPARTMENT 800 Saint-Jacques St., Office 55721 Montreal, QC, H3C1A3 Fax: 514-875-3819  DTC #5008      CUID: NBCS
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Approval by Donor

Date

