



## Gifts of Publicly Traded Securities

The Delta Community Foundation (the 'Foundation') is a registered Canadian charity (# 118884139 RR 0001) and welcomes gifts of publicly traded securities. Under current Canadian tax regulations, your donation of publicly traded securities is exempt from capital gains tax when you transfer the securities in-specie or in-kind to a charity. This form is used to facilitate these types of gifts.

### Electronic Transfer - Canadian or U.S. Securities

#### **DONOR**

1. Complete and sign the attached **Direction and Notification of Gift of Securities form** (Sections 1, 2 & 3)
2. Send this form to your broker (In the case of direct investing clients who do not have an assigned broker, you must communicate with the brokerage house call centre and download a copy of their donation form from their website. Once complete, send this form to that call centre).
3. Send a copy of the form to the Delta Community Foundation (contact information below).

The value of the tax receipt will be determined by the closing value of the securities on the date the securities are received in the Foundation's brokerage account.

#### **BROKER**

1. To initiate the electronic transfer of shares to the Foundation's custodian (Raymond James), forward the completed signed **Client Direction and Notification of Gift of Securities form** to:

Curt Hillier, Raymond James  
Tel: 604-943-5665  
Fax: 604-943-5658  
Email: [curt.hillier@raymondjames.ca](mailto:curt.hillier@raymondjames.ca)

Securities are transferred to the Delta Community Foundation account #1MQ-RAOA-0

It is **not** necessary to re-register the share certificates for gifting purposes - please retain shares in book base form.

2. Send a copy of the **Direction and Notification of Gift of Securities form** as soon as possible to:

Julie Berks, Treasurer, Delta Community Foundation, PO Box 18527, Delta, BC V4K 4V7  
[julieberks@deltafoundation.org](mailto:julieberks@deltafoundation.org)



## Client Direction and Notification of Gift of Securities

### 1. Client Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Town: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_

### 2. Client Advisor Information

Name of Client's Advisor: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal: \_\_\_\_\_

Client Account #: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

### 3. Information on Securities being transferred

Name of Securities: \_\_\_\_\_

CUSIP#: \_\_\_\_\_ CUID# \_\_\_\_\_ OTC# \_\_\_\_\_

Name of Shares/Units: \_\_\_\_\_

Date of Transfer (approx): \_\_\_\_\_

Client's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Securities transferred to the Delta Community Foundation account #1MQ-RAOA-0 and forwarded to:

Curt Hillier, Raymond James

Tel: 604-943-5665

Fax: 604-943-5658

Email: [curt.hillier@raymondjames.ca](mailto:curt.hillier@raymondjames.ca)