

CANADIAN  
CIVIL LIBERTIES  
ASSOCIATION



ASSOCIATION  
CANADIENNE DES  
LIBERTES CIVILES

### DONATION OF PUBLICLY TRADED SECURITIES

Donating a gift of securities is a tax-efficient way to make a difference and minimize taxes. Canadians who donate appreciated securities (this includes stocks, bonds and mutual funds) directly to a registered charity eliminate capital gains tax on the investment. The capital gains tax exemption does **not** apply if you sell the securities first and then donate the cash proceeds. To illustrate the added value of transferring a gift of securities, we've included a sample scenario below.

### **Instructions for donating a gift of securities:**

1. Complete the Transfer of Securities Form (page 2 of this document) with your broker and sent it to **both** RBC Dominion Securities and Canadian Civil Liberties Association by email:
  - **RBC Dominion Securities**  
Attn: Melissa Crawford  
Email: [melissa.crawford@rbc.com](mailto:melissa.crawford@rbc.com)  
Tel# : 416-842-7122 Fax# : 416-842-7127  
181 Bay Street, Suite 2200  
BCE Place  
Toronto, ON M5J 2T3
  - **Canadian Civil Liberties Association**  
Attn: Rayna Fletcher, Director of Administration  
Email: [rfletcher@ccla.org](mailto:rfletcher@ccla.org)  
Tel#: 416-646-1401 Fax#: 416-861-1291  
90 Eglinton Avenue East, Suite 900  
Toronto, ON M4P 2Y3
2. Instruct your broker/delivering custodian to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization. You may also wish to follow up with your broker to help ensure your instructions are carried out as intended.
3. Upon Receipt of the transferred securities to the CCLA brokerage account, we will issue a charitable tax receipt based on the closing market value of the shares on the date they are received into our brokerage account.

CCLA

90 Eglinton Avenue East, Suite 900  
Toronto, ON M4P 2Y3

416-646-1401

**Charitable Registration Number 754802288RR0001**



### **Transfer of Securities Form**

In order to make your gift, please complete this form with your broker. If you do not have a broker, complete the form and send it directly to your delivering institution.

#### **Donor Information**

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

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

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

#### **Broker/Delivering Custodian Information** (Broker/DC to complete)

Name of Broker: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name of Firm: \_\_\_\_\_ FINS #: \_\_\_\_\_

Broker Fax #: \_\_\_\_\_ Client Account # \_\_\_\_\_

I hereby authorize the transfer in kind of the following securities **to RBC Dominion Securities Inc (FINS# T002)** for credit to account #421-58674-19 in the name of the Canadian Civil Liberties Association, CUID: DOMA

#### **Description of Securities**

Name of Security: \_\_\_\_\_ CUSIP #: \_\_\_\_\_

Description of Security: \_\_\_\_\_ # of Shares/Units: \_\_\_\_\_

Date of Transfer: \_\_\_\_\_ Broker (FIN) Number: \_\_\_\_\_

Signature of Donor: \_\_\_\_\_

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