



# Gift of publicly traded securities to Oakville & Milton Humane Society

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

Thank you for your kind and compassionate gift for homeless, abused and injured wildlife. The Oakville & Milton Humane Society (OMHS) is grateful for your gift of securities. Under current tax regulations, your donation of publicly traded securities is exempt from capital gains tax only when you transfer the securities 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 into OMHS's brokerage account.

Please instruct your broker to complete this Gift of Securities Form and email to:

- Lisa Beartup, OMHS's broker: [lisa.beartup@rbc.com](mailto:lisa.beartup@rbc.com) | Tel: 905-845-5607 | Fax: 905-469-7005
- Ben Nguyen, OMHS Finance Manager: [benn@omhs.ca](mailto:benn@omhs.ca) | Tel: 905-845-1551 x 111 | Fax: 905-845-1973

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

## A. INFORMATION ABOUT YOU

Name		
Address	City, Province	Postal Code
Phone Number	Email	

## B. SECURITIES BEING TRANSFERRED FROM

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

**Account Name:** Oakville & Milton Humane Society  
**Account #** 537-11665-1-2  
**CRA #** 11906 4350 RR0001

**RBC Dominion Securities Inc.**  
 Investment Advisor: Lisa Beartup  
 Tel: 905-845-5607 | Fax: 905-469-7005  
 Email: [lisa.beartup@rbc.com](mailto:lisa.beartup@rbc.com)  
 DTC #5002      CUID: DOMA

Approval by Donor

Date

