



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

Donation of Securities Form

At the Oakville & Milton Humane Society (OMHS), 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 OMHS's brokerage account.

Instruct your broker to complete this form and email to:

- Lisa Beartup, OMHS's broker: lisa.beartup@rbc.com | Tel: 905-845-5607 | Fax: 905-469-7005
- Ben Nguyen, OMHS Finance Manager: benn@omhs.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

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
 DTC #5002 CUID: DOMA

Approval by Donor

Date

