

**GIFT OF SECURITIES**  
SECURITY TRANSFER NOTIFICATION FORM

Please help us handle and acknowledge your gift properly by emailing this form to:  
Attention: **HNS CONTACT INFORMATION**

In order to complete your donation, please contact your broker and arrange the share transfer to  
Henri Nouwen Society's preferred broker: **BANK Investorline Info**

**GIFT DETAILS**

\_\_\_\_\_  
Name of Security

\_\_\_\_\_  
Number of Shares

\_\_\_\_\_  
Approximate Value

\_\_\_\_\_  
Expected Date of Transfer

\_\_\_\_\_  
Name & Symbol & CUSIP number of Publicly Traded Securities to be Donated

**DONOR DETAILS**

\_\_\_\_\_  
Donor Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

A charitable tax receipt will be issued electronically if an email address is provided above.  
I would prefer not to receive marketing materials from the **Henri Nouwen Society** via email

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

\_\_\_\_\_  
Date

## GIFT OF SECURITIES | FREQUENTLY ASKED QUESTIONS

### How do I donate gift of securities?

1. Complete the **Gift of Securities Transfer Notification form** attached and forward it to the **Henri Nouwen Society** by email to **Colette Halferty, Director of Philanthropy and Special Events** [chalferty@henrinouwen.org](mailto:chalferty@henrinouwen.org) or call **1-866-226-2158 | 416 925 3745**  
Please ensure that a copy of the form is forwarded to the broker/investment adviser who will be responsible for the transfer to the **Henri Nouwen Society**.
2. Instruct broker to transfer securities to the Henri Nouwen society's Investor Line Account. **Please do not transfer securities without first forwarding attached form to the Henri Nouwen Society.**

### How long does this process take?

Once security has been transferred to the Henri Nouwen Society's broker account, it is policy that it will be sold within 1-3 days. When the security is sold there will be a 1-5 day period before the net proceeds are sent to the **Henri Nouwen Society** account. As per CRA rules, the **Henri Nouwen Society** will issue a gift-in-kind charitable tax receipt to the donor *for the full market value of the security on the same day as receiving the funds into their account* from the broker.

### What types of securities can I donate?

The **Henri Nouwen Society** will accept donations of publicly traded securities.

### Are flow through shares accepted?

As long as the shares have a Committee on Uniform Securities Identification Procedures (CUSIP) number and are publically traded, the process for donating flow through shares is the same as regular traded shares.

### What are the benefits of donating gift of securities to the Henri Nouwen Society?

If one sells a security, they pay tax on 50% of the capital gain. However, when donating gift of securities to the **Henri Nouwen Society** the taxable capital gain is completely eliminated. A tax receipt will be issued for the full market value of the security in the amount of the closing trading price the day that it was received in the Henri Nouwen Society's broker account.

### When will I receive my tax receipt?

The tax receipt is issued once the **Henri Nouwen Society** receives the deposit for the sale of the security from the broker. This is typically within 10 business days of the date that the securities were received in the Henri Nouwen Society's broker account.

### Where can I find out more information about gift of securities?

Information regarding securities and tax receipting can be found at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca) or [www.cra-arc.gc.ca/tx/ndvdl/tpcs/ncm-tx/rtrn/cmpltng/rprtng-ncm/lns101-170/127/gfts/menu-eng.html](http://www.cra-arc.gc.ca/tx/ndvdl/tpcs/ncm-tx/rtrn/cmpltng/rprtng-ncm/lns101-170/127/gfts/menu-eng.html)