



56 Sparks Street, Suite 600, Ottawa, Ontario K1P 5B1, Canada
T 1.800.565.6872 F 613.234.6842 weseedchange.org

Transfer of Common Shares and Mutual Funds

A Tax Smart Way to Donate to SeedChange

Donating stock is one of the easiest ways to support SeedChange's work and save on your tax return. The Federal Government now provides an extra incentive for donations of appreciated stocks and mutual funds to registered charities.

When you transfer publicly traded securities directly to SeedChange you will receive a tax receipt for the **fully appreciated value** of the donation and **you won't pay any capital gains tax**.

Here are a few easy steps to follow to make your donation:

1. **Inform your broker** that you would like to donate publicly traded securities or mutual funds to SeedChange.
2. **Fill out the form** on the next page and deliver it to your broker. You can either do that by:
 - printing the form, filling it out by hand, and delivering it to your broker
 - saving this electronic document to your computer, opening it with Adobe Reader, and filling it out electronically before saving and emailing it to your broker.
3. **Please let us know about the gift so we can issue you a receipt promptly.** When securities are transferred by a broker, we don't automatically know who made the gift. By telling us in advance you'll be helping us to process your donation in the most efficient way possible. You can let us know by:
 - Sending us a copy of this form when you send it to your broker, or
 - Asking your broker to email us when the transfer has been made, or
 - Calling or emailing us to let us know.

If you have any questions about the transfer process, please contact Martin Settle, Executive Director, at 1.800.565.6872 x 236 or by email martin@weseedchange.org

If you are looking for a way to make a significant contribution to SeedChange, **please consider this method**. You will save taxes and be able to help even more people.



SeedChange was founded in 1945 by Dr. Lotta Hitschmanova as the Unitarian Service Committee of Canada (USC Canada).



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To complete your donation, please fill out this form and send to your broker/brokerage firm to initiate the transfer of your securities to SeedChange.

LETTER OF RELEASE FOR A SECURITIES TRANSFER TO SEEDCHANGE

Please accept this letter as instructions to transfer the following securities:

Number or dollar amount of shares: _____

Name of shares: _____

From my account number _____ to SeedChange at the brokerage listed below.

Donor's Signature: _____ Date: _____

DONOR INFORMATION

Name: _____

Address: _____

Phone: _____

DONOR'S BROKER OR BROKERAGE FIRM CONTACT INFORMATION

Name: _____

Address: _____

Phone: _____

SEEDCHANGE BROKER

BMO - Nesbitt Burns

Capital Centre, 269 Laurier Avenue West, Suite 201, Ottawa, ON K1P 5J9

FINS# T009, DTC# 5043, CUID # NTDT

Brokerage Account for SeedChange: 460-10437-16

Contact: Marianna Halkai, Associate Investment Advisor

T: 613.567.6235 | F: 613.237.7801 | marianna.halkai@nbpcd.com

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SeedChange Charitable Registration Number: 11927-6129-RR-0001



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