

# SECURITIES

Your gift can create a legacy of support

If you own public securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to The Ottawa Mission Foundation you can avoid taxes and make a significant gift at the same time.

## BENEFITS FOR YOU

1. Opportunity – An opportunity to make a significant gift.
2. Tax Advantages – You eliminate the tax on capital gains.
3. Simple and Convenient – Securities are easy to transfer. We will provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to that of The Ottawa Mission Foundation.
4. Recognition – Your gift can be honoured during your lifetime, should you wish

## HOW DOES IT WORK?

A donation receipt is issued for the fair market value of the security at day's end on the date of transfer. You must have your broker transfer the securities to The Ottawa Mission Foundation. The gift will not qualify for the elimination of capital gains tax if the securities are sold and the cash then gifted to the Foundation.

## GIVING REDUCES CAPITAL GAINS TAX

	<b>OPTION 1</b> <b>Sell Stock</b> <b>&amp; Donate Cash</b>	<b>OPTION 2</b> <b>Donate Stock Directly</b>
<b>Value of stocks</b>	\$10,000	\$10,000
<b>Cost base</b>	\$2,000	\$2,000
<b>Capital gain</b>	\$8,000	\$8,000
<b>Taxable capital gain</b>	\$4,000	\$0
<b>Tax Credit (50% x \$10,000)</b>	\$5,000	\$5,000
<b>Tax on gain</b>	\$2,000	\$0
<b>TAX SAVING</b>	<b>\$3,000</b>	<b>\$5,000</b>

For further information, please contact Angie Kelly, Director, Major and Planned Giving at (613) 234-1155 ext. 426 or by email at [akelly@ottawamission.com](mailto:akelly@ottawamission.com)



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[ottawamission.com](http://ottawamission.com)

Charitable Registration Number (BN): 831058615 RR0001

# SECURITIES

Your life insurance gift can create a legacy of support

## MAKING A GIFT OF SECURITIES

Once you have decided to make a gift to The Ottawa Mission Foundation and have determined which securities are to be transferred, including the number of shares, the name of the corporation(s), and the proposed date of transfer, your broker should notify, by email, the following:

Chris Stuart - Doherty & Assoc. Ltd  
email: chris.stuart@doherty.ca

Irene Buenaobra - National Bank Correspondent Network  
email: irene.buenaobra@nbc.ca

Angie Kelly - The Ottawa Mission Foundation  
email: akelly@ottawamission.ca

Receiving Institution:  
National Bank Correspondent Network  
130 King Street W., 30th Floor  
Toronto, ON M5X 1J9

*Canadian Securities* should be delivered to CDS FINs T080 (CUID NBCS)  
Client account number: 6C764DA

*US Securities* should be delivered to DTC #5008  
Client account number: 6C764DB

For *Mutual Funds*, the dealer code is 9822.

Securities are received by National Bank Correspondent Network and are valued at the close of trading for that day. An official tax receipt will be issued by The Ottawa Mission Foundation for that amount.

***The Ottawa Mission Foundation encourages you to seek professional advice before deciding on a gift of securities or other planned gift.***



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