

# Donate Securities

With your support the CCPA can continue to produce high quality research — and make sure it gets into the hands of citizens, journalists, policy makers and progressive organizations.



## INSTRUCTIONS TO TRANSFER PUBLICLY LISTED SECURITIES TO THE CANADIAN CENTRE FOR POLICY ALTERNATIVES (CCPA)

Thank you for your interest in donating a gift of securities to the CCPA. Under current tax regulations, your donation of publicly traded securities is exempt from capital gains tax only when you transfer the securities in-kind to the CCPA.

The CCPA accepts all publicly traded securities. A charitable tax receipt will be issued and will be based on the fair market value of the shares, determined by the closing day price of the shares the day it arrives in our brokerage account. The CCPA's policy is to sell the securities as soon as possible. In cases where the securities are sold on the date they are received, the fair market value will be the proceeds of the sale before commissions or fees.

### Electronic Transfer — Canadian and U.S. Securities

**1.** To facilitate the transfer, please initiate the donation with your broker and forward a completed and signed copy of this form to your Investment Advisor/brokerage institution. Your Investment Advisor/brokerage institution will arrange for the electronic transfer of shares to the CCPA's broker.

**2. IN ORDER TO ISSUE A CHARITABLE TAX RECEIPT TO YOU** please email a copy of the **Direction and Notification of Gift of Securities** form to Katie Loftus at the CCPA: [katie@policyalternatives.ca](mailto:katie@policyalternatives.ca).

Don't hesitate to contact Katie by phone if you have any questions: toll free at 1-844-563-1341 Ext. 318 or 613-563-1341 Ext. 318.

**3.** A charitable tax receipt will be issued by the CCPA if you complete this form and submit it to Katie — otherwise there is a risk that we can't identify you as the donor.

## Direction and Notification of Gift of Securities

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

### Donor's Information

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

This form authorizes the transfer of the following securities to The CCPA:

1. Name of Shares: \_\_\_\_\_

# of Shares: \_\_\_\_\_

2. Name of Shares: \_\_\_\_\_

# of Shares: \_\_\_\_\_

3. Name of Shares: \_\_\_\_\_

# of Shares: \_\_\_\_\_

### Broker/Investment Advisor Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Securities Being Transferred To

Account Number: **#439-20013-11**

Account Name: Canadian Centre for Policy Alternatives

FINS: #TO85 CLEAR STREAM: #52065

DTC: 5011 CUID: SCOT

CCPA Charitable Registration: #124146473RR0001

### ScotiaMcLeod

350 Albert Street, Suite 2100 Ottawa, ON K1R 1A4

Investment Advisor: Jason Bell, Tel: 613-782-6769

E-mail: [jason.bell@scotiawealth.com](mailto:jason.bell@scotiawealth.com)

Associate: Lorraine Alexan, Tel: 613-788-6326

E-mail: [lorraine.alexan@scotiawealth.com](mailto:lorraine.alexan@scotiawealth.com)

### Gift Designation

General  Specific: \_\_\_\_\_

Please contact Katie Loftus to discuss