

## Procedure for gifts of securities or mutual funds

Dear Philanthropist,

Thank you so much for considering a gift of securities or mutual funds to our organization. Your generosity will greatly support our cause and will make a real difference in our work. Please follow these simple steps to make your gift:

- **Step 1: Preparation**

1. **Contact us:** Before making a gift, please contact the Planned Giving team. You can reach us by phone at 514-495-2409, ext. x135, or by email at [klaporte@missioninclusion.ca](mailto:klaporte@missioninclusion.ca). We'll be happy to answer your questions and provide you with any information you need.
2. **Consult a financial advisor:** It is recommended that you talk to a financial advisor to discuss the tax implications and benefits of your gift. They can provide personalized advice based on your financial situation.

- **Step 2: Transfer the securities or mutual funds<sup>1</sup>**

1. **Decide on the gift:** Choose the specific securities or mutual funds you wish to donate.
2. **Send an electronic transfer:** You can ask your broker or financial institution to transfer securities or mutual funds directly to our brokerage account. It is very important to send us the Gift of Securities Transfer Form before proceeding with the transfer.<sup>1</sup>

- **Step 3: Notification and acknowledgement**

1. **Notification of Gift:** Once the transfer has been made, please notify us of the transfer date. This is important for determining the market value of your securities and the amount of the tax receipt.
2. **Acknowledgement:** We will send you an official acknowledgement to thank you for your donation. This letter can also be used as a tax receipt, in accordance with current legislation.

- **Step 4: Tax benefits**

1. **Tax receipt:** We will issue an official tax receipt for your donation in accordance with current tax regulations. This tax receipt can be used to claim tax deductions up to the total value of your securities, as applicable.
2. **Consult a tax expert:** To maximize the tax benefits of your gift, we recommend that you consult a tax professional who can guide you through the specific rules in your jurisdiction.

Your gift of securities or mutual funds is a valuable contribution that will have a lasting impact on our mission. We extend our heartfelt thanks for your continued support. Please feel free to contact us if you have any questions

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<sup>1</sup> You will find our banking information and all other necessary information on the Transfer Form.