

Procedure: Everything You Need to Know About Securities Practical Guide for Securities and Mutual Funds

We sincerely thank you for your intention to make a donation of securities or mutual funds to our organization. Your generosity will significantly contribute to supporting our cause and making a significant difference in our work. Here are the simple steps to complete this donation:

Step 1: Preparation

1. **Contact Us:** Before proceeding with the donation, please get in touch with our planned giving team. You can reach us by phone at 514-495-2409 extension 120 or by email at klaporte@missioninclusion.ca. We will be delighted to answer your questions and provide you with all the necessary information.
2. **Consult a Financial Advisor:** It is recommended to consult a financial advisor to discuss the tax implications and benefits of your donation. They can provide you with personalized advice based on your financial situation.

Step 2: Transfer of Securities or Mutual Funds¹

1. **Decide on Your Donation:** Choose the specific securities or mutual funds you wish to donate.
2. **Electronic Transfer:** You can ask your broker or financial institution to transfer the securities or mutual funds directly to our brokerage account. It is essential to send us the securities donation transfer form before proceeding with the transfer¹, so that it can be signed and authorized by our director for approval.

Step 3: Notification and Recognition

1. **Donation Notice**
2. **Once the securities transfer has been completed**, please inform us on the same day as the transfer and send us proof of execution (e.g., transfer notice from your broker).

This step is essential to:

- determine the market value of the securities at the time of donation, in accordance with tax requirements;
- allow us to confirm and accept the transfer officially.

¹ You will find our banking information and all other necessary information on our transfer form.

3. **Thank You Letter and Tax Receipt:** As soon as we receive confirmation of the transfer, we will send you an official thank you letter, accompanied by your tax receipt. This letter demonstrates our gratitude and can also serve as documentation for tax deduction purposes, according to applicable laws.

Step 4: Tax Benefits

1. **Tax Receipt:** We will provide an official tax receipt for your donation in accordance with current tax regulations. This tax receipt can be used to claim tax deductions, where applicable, for the total value of your securities.

Thank you for your interest in this securities, securities and mutual fund donation procedure.

We hope this form has answered your questions, and we remain available to provide you with any additional information you may need.

You can contact me at 514-495-2409 extension 120 or by email klaporte@missioninclusion.ca directly for any additional information.