Canadian Mental Health Association
Toronto

GIFT OF SECURITIES

A step-by-step guide

STEP 1:

Contact the Fundraising Coordinator at 416-904-3380 or at giving@cmhato.org. They will provide you with the required account information and help to answer any questions you may have regarding your donation.

STEP 2:

Complete the Notification of Securities Transfer Form. Please be sure to complete all sections of the form. Your broker can assist you with the other information required. Please do not transfer securities without first forwarding the form.

STEP 3:

Email a copy of the completed Transfer Form to giving@cmhato.org.

STEP 4:

A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to CMHA Toronto. Eligibility of a tax receipt for the current year requires that securities must be in CMHA Toronto's brokerage account by 5:00pm on December 31 of that year.

For more information, contact:

Fundraising Coordinator
416-904-3380
giving@cmhato.org

NOTIFICATION OF SECURITIES TRANSFER FORM

Canadian Mental Health Association Toronto

DONOR DETAILS

Name:

Address:

Phone Number: Email:

A charitable tax receipt will be issued electronically if an email address is provided

I would prefer to receive my tax receipt by mail ☐

GIFT DETAILS

Number of Shares: Name of Security:

Approx. Amount of Donation: Expected Date of Transfer:

Designation Details:

YOUR BROKER DETAILS

Broker Name:

Financial Institution:

Phone Number: Email:

Signature of Donor

Date

CMHA Toronto Charitable Registration Number: 893449884RR0001

Fundraising Coordinator
416-904-3380
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