Canadian Mental Health Association
Toronto

# GIFT OF SECURITIES

## A step-by-step guide

### STEP 1:

**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. Note that the form can be completed both digitally or by hand.

### STEP 2:

**Send the completed transfer form to your broker or investment advisor who will initiate, and be responsible for the transfer.** If you do not have a broker, fax this form directly to your investment firm. CMHA Toronto cannot initiate the transfer.

### STEP 3:

**Email a copy of the completed Transfer Form to Cory Bartlett, Senior Manager of Fundraising & Events at cbartlett@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. All securities are sold on the same day as received by CMHA Toronto.

**For more information, contact:**

**Cory Bartlett**
**Senior Manager of Fundraising & Events**
647-522-0042
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