

# TVO GIFT OF SECURITIES FORM



The Ontario Educational Communications Authority (TVO) is grateful for your gift of securities. Under current tax regulations, your donation of publicly traded securities is exempt from capital gains tax only when you transfer the securities in-kind. A charitable donation receipt for income tax purposes will be issued based on the fair market value of the securities on the date (closing price) the securities are received into TVO's brokerage account.

## To donate publicly traded securities, follow these simple steps:

- 1 Mail a copy of this form to **Katherine McKellar**, Manager, Leadership Giving, at the address listed below **OR** you may scan and e-mail it to **kmckellar@tvo.org**.
- 2 Please provide a copy of this form to your broker and instruct him/her to complete the transfer of securities in-kind.
- 3 For questions about gifts of securities transfer process, please contact Katherine at **416.484.2600 x2252** or **kmckellar@tvo.org**.

Your broker may contact us directly, or if you prefer, we can contact your broker to support you in making your donation.

## Notification of Gift of Securities

### Donor Information:

DONOR NAME

ADDRESS

CITY

PROVINCE

POSTAL CODE

TELEPHONE

EMAIL

### Securities being transferred from:

NAME OF DELIVERING INSTITUTION

CONTACT NAME

TELEPHONE

NAME OF SECURITIES

NUMBER OF SHARES/UNITS

APPROXIMATE DATE OF TRANSFER

### Securities being transferred to:

RBC Dominion Securities Denham Loree Wealth Management Group

200 Bay Street, Suite 2500  
Toronto, ON M5J 2J2  
T: 416.842.2471  
F: 416.842.2434

TVO Account: 441-57282-1-3  
FINS: T002  
CUID: DOMA  
DTC: 5002  
Dealer/Rep Code: 9190/KYS

### Donor Authorization:

DONOR SIGNATURE

DATE