



# Gifts of Publicly Traded Securities and Mutual Funds

Thank you for supporting Habitat for Humanity Canada with a gift of securities.

This form is to be completed by the donor and authorizes your broker to complete the transfer of securities to Habitat for Humanity Canada. Please note, you will receive a tax receipt for the fair market value, which is the selling price of the securities on the date the gift is sold by Richardson Wealth. It is Habitat for Humanity Canada's policy to sell any donated securities at the first opportunity, generally within 24 hours.

## Donor information

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## Broker information

Name of donor's broker and firm \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## Securities to be donated

Name of securities \_\_\_\_\_

Number of shares or units \_\_\_\_\_

Description of securities \_\_\_\_\_

(e.g. CUSIP, common, preferred, Exchange, symbol, etc.)

## Please have your broker contact Richardson Wealth to verify transfer of securities

**Habitat for Humanity Canada Account # H1J-EZ00-A**

**Richardson Wealth, Kitchener ON**

CUID: FIDC DTC # 5040

Mutual Fund Dealer/Rep Code 7673 RWRC

[team.caldwell@richardsonwealth.com](mailto:team.caldwell@richardsonwealth.com)

Telephone: 1-519-772-7816

Fax: 1-519-772-7810

## Designation options

Families across Canada

Indigenous Housing Partnership

My local Habitat

Global Housing Projects

Other \_\_\_\_\_

\_\_\_\_\_  
Signature of Donor

\_\_\_\_\_  
Date

## Please email or fax this form to

1. Richardson Wealth
2. **Tashi Dolker**, Director, Finance, Habitat for Humanity Canada

[team.caldwell@richardsonwealth.com](mailto:team.caldwell@richardsonwealth.com)  
[tdolker@habitat.ca](mailto:tdolker@habitat.ca)