



GIFTS OF SECURITIES

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. When donating those securities directly to Habitat for Humanity Vancouver Island North you can avoid taxes and make a significant gift at the same time.

How does it work?

A donation receipt is issued for the fair market value of the security at day's end on the date of transfer. You must have your broker transfer the securities to Habitat for Humanity Vancouver Island North.

The gift will not qualify for the elimination of capital gains tax if the securities are sold, and the cash then gifted.

What you can donate:

- stocks
- mutual funds and segregated funds
- bonds and flow-through shares
- employee stock options

Benefits include:

Opportunity

- An opportunity to make a significant gift.

Tax Advantages

- You eliminate the tax on capital gains.

Simple & Convenient

- Securities are easy to transfer. We will provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to that of Habitat for Humanity.

Recognition

- Your gift can be honoured during your lifetime, should you wish.

For additional information, contact:

Sara Lopez

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Scan for more info
or visit:

vin.habitat.ca/en/ways-to-give/legacy

Charitable Registration #86508814RR0001

What are my next steps?

Option 1:

Make your gift online through CanadaHelps.

- Visit our secure CanadaHelps page.
- Select “Securities” as your donation type.
- Follow the guided steps to transfer your shares.
- CanadaHelps will handle the process and issue your tax receipt.

Option 2:

Transfer through your broker

- Contact us to let us know your intent to donate
- Ask your broker to initiate a transfer of securities to Habitat for Humanity Vancouver Island North
- Complete a Letter of Direction (your broker can provide this)

We'll provide any additional details your broker needs and ensure you receive a tax receipt once the transfer is complete.

Let's work together to ensure your legacy lives on.

This information and material is intended to provide general examples and reference tools for understating the way in which charitable gifts may be made to Habitat for Humanity and is for illustration purposes only. Habitat for Humanity does not give legal or financial advice. Habitat for Humanity strongly recommends donors review this information and material and consult with independent legal, financial and/or tax advisors. This will ensure you receive appropriate legal advice, your financial goals are considered, your tax situation reviewed and your legacy gift is otherwise tailored to your personal circumstances.

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