



Gifts of Publicly Traded Securities and Mutual Funds

Thank you for supporting Habitat for Humanity Greater Ottawa 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 (designated to Habitat Greater Ottawa). 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

Telephone: 1-519-772-7816

Fax: 1-519-772-7810

Designation options

Families across Canada

Indigenous Housing Partnership

My local Habitat, Greater Ottawa

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
3. **Shawna Blanchard**, Director, Fund Development, Habitat for Humanity Greater Ottawa

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