

Gifts of Stock and Securities



The Nova Scotia Nature Trust welcomes gifts of securities such as stocks or mutual funds. Donating securities is an easy way to protect Nova Scotia's natural legacy.

You will receive a tax receipt for the fair market value for any publicly traded security that is transferred to the Nature Trust.

Make a gift today, and/or arrange for a future estate gift in your will.

Your donation must be an 'in-kind' transfer of the security itself, not the cash proceeds from the sale of the security. Security donations take longer to process than regular donations. This is especially important to keep in mind at year end.

BENEFITS TO YOU:

- By donating securities, the tax on the capital gains is eliminated, providing you with a tax advantage. It's one of the most cost-effective ways of giving.
- The Federal Government implemented tax laws to help you donate to charity, and to make it advantageous to donate securities **INSTEAD** of cash.
- Donating stock instead of cash gives you a chance to review and update your portfolio, reducing the capital gains held, which will reduce future tax owing.

HOW TO MAKE A GIFT OF SECURITIES:

Please use the donation form below. There are only 3 steps to complete! An official receipt for income tax purposes will be issued by the Nature Trust when your security is received.

Please Note: The value of the tax receipt will be based on the closing price of the securities on the day they were received into the Nature Trust's account in accordance with Canada Revenue Agency regulations.

Please complete these steps in this order:

1. *Populate the attached form and add your signature.*
2. *Send a copy of the form to the Nature Trust (or ask your broker to do this).*

We must have this signed form in hand BEFORE we can accept your donation.

Send to: Barbara Haley, Leadership and Legacy Giving Senior Advisor, at barbara@nsnt.ca or via fax at 902-429-5263.

3. *Give the form to your broker or your investment firm (or arrange for the transfer yourself if you have a self-directed account). Your broker will also need your account number, but the Nature Trust does not need this confidential information.*

If you have questions, please call Barbara at 902-579-9977.

DONATION OF PUBLICLY TRADED SECURITIES TO THE NOVA SCOTIA NATURE TRUST

Information for the Nature Trust

Must be received by the Nature Trust BEFORE the transfer of securities is started.

Please send to Barbara Haley at barbara@nsnt.ca or fax 902-429-5263.

DONOR INFORMATION

Name:

Address:

City:

Prov:

Postal Code:

Phone:

Email:

Investment Account Name (if different from Donor name):

Is this a corporate account? ☒ Y ☐ N

☐ I work with a broker **OR**

Is this is a joint account? ☒ Y ☐ N

☐ I use a self-directed investment platform

BROKER INFORMATION (IF APPLICABLE)

Broker's Name:

Brokerage Firm Name or Financial Institution:

TRANSFER SECURITIES

Name of Security:

of Units/Shares:

Name of Security:

of Units/Shares:

Name of Security:

of Units/Shares:

Name of Security:

of Units/Shares:

☐ I would like my gift to be directed where it is needed most **OR**

☐ Other designation: _____

Signature(s): _____ Date: _____

Information for Your Broker (or investment institution if self-directed)

Please e-transfer the above noted securities to the Nova Scotia Nature Trust's account:

Credential Securities Inc.

Attn. Camille Li, Partner and Client Care
FINS T088
Account Number: 513718A1
CUID: CRED
Dealer Rep: 7799-5FGA

#700-1111 West Georgia St
Vancouver BC V6E 4T6
Tel (604) 742-2918
Fax (604) 714-3901
cli@aviso.ca