

**give securities. build homes. strengthen communities**

## did you know?

- When you donate publicly traded securities directly to Habitat, you **eliminate the capital gains tax** you would have paid if you sold them first.
- You **receive a charitable tax receipt** for the fair market value of the securities.
- This type of donation often **allows donors to give more** than they could through cash alone.
- The **process is straightforward** and can be completed through your financial advisor.

## why donate securities?

### 1. Maximum tax efficiency

Canada's tax rules allow donors to reduce their tax burden by gifting securities directly. This can make your gift more cost effective while increasing its impact.

### 2. Immediate, tangible impact

Your contribution supports Habitat OGN's mission to build affordable homes with working families. Your gift translates into lumber, trusses, foundations, energy-efficient systems, and all the elements needed to bring a home to life.

### 3. A strategic way to give

Many donors choose this method as part of their annual tax planning or long-term philanthropic strategy.



**Giving publicly traded securities is one of the most tax-effective ways of making a meaningful impact.**

## what types of securities can be donated?

- Publicly traded stocks
- Bonds
- Mutual funds
- ETFs

If the security trades on a designated stock exchange, we can receive it.

## how to donate securities

**1. Complete the Habitat OGN Securities Donation Form.**

This helps ensure your gift can be matched to you and receipted correctly.

**2. Send the signed form to [donate@habitatgatewaynorth.com](mailto:donate@habitatgatewaynorth.com).**

We must have the form before the transfer is initiated.

**3. Provide the transfer instructions to your broker.**

Our account information is listed on the form.

**4. Your broker transfers the securities.**

Valuation is based on the closing price on the day the securities reach our brokerage account.

**5. We issue your charitable tax receipt.**

**your donation of securities generates an immediate, tangible impact**

## where your gift goes

Your contribution supports:

- Affordable home construction
- Infrastructure and site works
- Accessibility features for families with mobility needs
- Energy-efficient designs that reduce long-term costs for homeowners

You can [designate your gift](#) to the Area of Greatest Need or to a specific project such as Building Futures in Sudbury, our home for a Canadian Veteran.

## make a lasting difference

A gift of securities helps families build stability, security, and a strong future. Your generosity accelerates home construction and directly supports hardworking households in our communities.



## Ready to get started?

Email: [donate@habitatgatewaynorth.com](mailto:donate@habitatgatewaynorth.com)

Phone: 705-646-0106

Address: A3 505 Muskoka Road 118W, Bracebridge, Ontario P1L 1T4

Charitable Registration Number: 887017515 RR 0001

## Gift of publicly traded securities (stocks, bonds, and mutual funds)

Thank you for your interest in donating to Habitat for Humanity Ontario Gateway North (HFHOGN).

We are pleased to facilitate gifts of publicly traded securities. To ensure prompt and accurate receipting of your donation, **prior to transferring** securities to our account, please email this signed form to [donate@habitatgatewaynorth.com](mailto:donate@habitatgatewaynorth.com)

HFHOGN Transfer Information (please provide the following details to your broker)			
Account #	CUID	DTC / FINS#	EUROCLEAR
5460413312	DOMA	5002	90065
Contact Info			
Habitat for Humanity Ontario Gateway North A3-505 Muskoka Rd., 118W Bracebridge, ON P1L 1T4		P: 705-646-0106 E: <a href="mailto:donate@habitatgatewaynorth.com">donate@habitatgatewaynorth.com</a>	

Donor information			
First Name	Last Name	Company / Organization	
Primary Phone	Email		
Mailing Address			
Street / PO Box / Suite #			
City	Prov	Postal Code	

Gift Designation [Check one]	
Area of Greatest Need	Specific Designation

Description of securities		
Security Description / Name	CUSIP / ISIN / FUND CODE	Quantity
Security Description / Name	CUSIP / ISIN / FUND CODE	Quantity

Broker information		
Name of Firm	Name of Broker	DTC/FINS#
Primary Phone	Email	Fax
Client Account #	Account Name	

Donor Authorization		
This signed form confirms my intention to donate the stated securities (stocks, bonds, mutual funds) to HFHOGN:		
Donor Print Name	Donor Signature	Date (YYYY/MM/DD)