



# OUTWARD BOUND CANADA

## Give the Gift of Stock to support Outward Bound Canada's programs

### Benefits of Giving Stock

Your charitable gift of stock can be applied to your income taxes over the next five years. In addition, thanks to changes made by the Federal Government on May 2, 2006, any capital gains taxes you would have normally paid on the shares are eliminated.

### How to make a gift of stock

**There are two simple steps that need to be taken in order to make a gift of stock:**

1. Contact your broker to initiate the gift
2. Contact Outward Bound Canada Foundation to inform them of your gift: 1-888-688-9273 Ext 201 or by email at [donate@outwardbound.ca](mailto:donate@outwardbound.ca)

#### 1. Contacting your Broker

Your broker will require specific information in order to make an electronic transfer of stock from your account to the appropriate account of the Outward Bound Canada Foundation. The attached form ("Letter of Instruction for Stock Transfer") contains all the information your broker will need. In fact, you can complete this form and forward the information to your broker in order to initiate the transfer.

#### 2. Contacting Outward Bound

In case your broker does not forward this information to Outward Bound, it is important to ensure that:

- A. Outward Bound knows the gift is on its way.
- B. Outward Bound knows how you would like the gift to be used.
- C. Outward Bound knows whom the gift is from and in whose name to issue a tax receipt.

Please contact Jody Harmon to notify her of your gift, or fill out the attached form ("Notice of Transfer of Stock") and email, fax or mail a copy to the Outward Bound Canada Foundation

Email: [donate@outwardbound.ca](mailto:donate@outwardbound.ca)  
Phone: 888-688-9273 Ext 201

#### What happens next:

Our broker will sell the stock on behalf of the Outward Bound Canada Foundation. Our broker then issues a cheque to the Foundation for the net proceeds of your gift. Once your gift is received, the Foundation will process your donation and issue a tax receipt.



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## Confirmation of the Donation of Securities

Please complete this form and return it to Outward Bound Canada Foundation. If you would prefer to send a personalized letter advising us of your donation please provide the information outlined below. Thank you for your support.

**The following transfer of securities to Outward Bound Canada Foundation was initiated by me:**

The name of the security was: \_\_\_\_\_  
(please include a full description, including the share symbol)

The number of shares transferred was: \_\_\_\_\_

The date of the transfer was: \_\_\_\_\_

Name of donor: \_\_\_\_\_  
(This could be a private name or the name of a corporation)

**Please issue tax receipt as follows:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**As discussed, the donation is to be directed to:**

- Outward Bound Canada's Operations
- Outward Bound Canada's Capital Projects
- Outward Bound Canada's Community Programs, or a specific program  
Name of Program: \_\_\_\_\_
- Other, please specify: \_\_\_\_\_

**Please phone, email, fax or mail this information to:**

Jody Harmon Finance and Office Administrator,  
Outward Bound Canada  
550 Bayview Ave Building One Suite 201  
Toronto, ON M4W 3X8

Phone: 1-888-688-9273 extension 201

Fax: 1-705-224-5959

Email: donate@outwardbound.ca



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## Letter of Instruction for Securities being Transferred as a Donation

(To be sent to your Investment Advisor)

Please transfer \_\_\_\_\_ shares of \_\_\_\_\_ to the Outward Bound Canada Foundation's account at MacDougall, MacDougall, MacTier Inc., CUID # MMMM.

I am aware that I am relinquishing the stated number of shares of the stated stock to the Outward Bound Canada Foundation, a/c 033-827E-2 Cdn. or a/c 033-827F-0 US.

Thank you,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Please print name)

\_\_\_\_\_  
(Date)

### Contact Information

MacDougall, MacDougall & MacTier Inc.

Phone: 416-977-0663

Toll-free: 1-800-461-3485

Fax: 416-596-7453 (Attention Bart MacDougall or Linda Miniota)

Outward Bound Canada Foundation, Attention Jody Harmon

Phone: 1-888-688-9273 extension 201

Fax: 1-705-224-5959 (Attention Jody Harmon)

[donate@outwardbound.ca](mailto:donate@outwardbound.ca)

Outward Bound Canada  
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