

Transferring Shares

Anyone holding publicly traded securities in a taxable (i.e. non-RRIF, RRSP, TFSA) account will save both the full capital gains taxes on their share donation amount, as well as receiving the full-tax deduction receipt that they can use on their tax return.



This is definitely advantageous to anyone who holds publicly traded taxable securities.

To donate shares, simply fill out the form on page 2 of this document, and return it to the Church Office. (Don't have a printer? No problem: You can pick up printed version of this form on the foyer table).

If you have questions, contact [Janni in the Church Office](#) at 604-926-1621.



North Shore Unitarians

370 Mathers Ave
West Vancouver, BC V7S 1H3
604-926-1621
www.northshoreunitarians.ca
Email: info@northshoreunitarians.ca

BELONG WITH HEART. THRIVE IN SPIRIT. ACT IN SERVICE

Donation Request

To: _____ **Transferring Institution** (your brokerage firm)
 _____ Address of the Transferring Institution (your brokerage firm)

Re: _____ **Donor's Name** (your name)
 _____ Donor's Address (your address)

Account Number: _____ Your account number with your brokerage firm

I authorize and direct the *transfer in kind* of the following securities from the above noted account to the Odlum Brown Limited account number noted below.

Approximate dollar value of shares being transferred: \$ _____

Security Description	CUSIP/ISIN/SEDOL#	# of shares/units
_____	_____	_____
_____	_____	_____
_____	_____	_____

Deposit Securities to Odlum Brown Account held by North Shore Unitarian Church (NSUC):

NSUC's Odlum Brown Account Number: _____ (get the # from the Church Office)
NSUC's Canada Revenue Agency Charity Registration Number: **11906 1414 RR 0001**

In order to process this transfer, please forward this completed form to:

Cameron Runte
Odlum Brown Limited
1100 – 250 Howe Street
Vancouver, BC V6C 3S9
Email: crunte@odlumbrown.com
Phone: 604-669-1600 / Fax: 604-844-5413
CUID: OBLV DTC# 5074 / Mutual Fund Dealer #9195

Signature of Donor: _____ Date: _____