

# Information on Donating Gifts of Publicly Traded Securities to Kids Help Phone



## Thank you!

Thank you for considering making a gift of publicly traded securities to Kids Help Phone. Below, you will find what you need to know on how to begin the process of making this vital and important gift.

## You can ensure young people have a safe space to turn to by supporting Kids Help Phone

Kids, teens and young adults are remarkable and resilient, and yet they sometimes find themselves in difficult situations with nowhere to turn. For the child who is bullied relentlessly. The teen who spends March Break thinking about suicide. The young person who feels completely alone in their remote community. Thanks to you, a young person can receive immediate, free and professional counselling from Kids Help Phone 24 hours a day.

Kids Help Phone is a national, registered charitable organization, trusted by partners, experts, and, most importantly, young people across Canada, to provide counselling, information and referrals when needed the most. Whether just once, or many times over the years of growing up, a young person can receive immediate, free, and direct access to French and English support from Kids Help Phone 24/7/365 - without fear of judgement or consequence. Our mission is to be always open, providing a safe and trusted place for young people in any moment of crisis or need.

Viewed as a leader internationally, Kids Help Phone has developed unparalleled expertise and insight into the issues youth are facing that impact their social and emotional health. As an organization that speaks with young people every day, Kids Help Phone works to share their perspectives and improve their well-being on a societal level. Your gift will ensure that young people in every community across Canada will have access to a trusted and relevant source of mental health and well-being support. You can be assured that your gift will make a tremendous impact, saving and changing lives.

## How to Make Your Gift of Publicly Traded Securities to Kids Help Phone



Making a gift of Publicly Traded Securities (most commonly stocks, bonds and mutual funds) is simple to do. Just follow the four steps below, and send the completed “Letter of Authorization” form by fax, mail or e-mail to **BOTH your broker and Kids Help Phone**.

**Step #1: Obtain a “Letter of Authorization”** form from Kids Help Phone (final page of this document) OR by calling Janet Farrell, Senior Development Officer, Philanthropy at 416-586-5437 ext. 8392 or by email at [janet.farrell@kidshelpphone.ca](mailto:janet.farrell@kidshelpphone.ca). ***This form is your instruction to your broker to transfer securities to Kids Help Phone.***

**Step #2: Complete all sections of the form** including the CUSIP # (which is provided by your broker/investment advisor) of the assets being transferred. The CUSIP # acts like a transaction number in case the transfer need to be tracked by your broker. For privacy reasons, your broker cannot disclose your name to us, so please make sure to complete the Donor Information portion of the form.

**Step #3: Fax or scan/e-mail the completed form to your broker or investment advisor** who will initiate, and be responsible for, the transfer. Sending the form by mail will delay the start of the transfer process and may affect the ultimate receipt value. Please call Janet Farrell at Kids Help Phone at 416-586-5437 x 8392 if you are sending the transfer form by mail.

Your broker can arrange for the electronic transfer of securities to our BMO Nesbitt Burns Account:

BMO Nesbitt Burns Inc.	Account No. 415-22902-11
Investment Advisor: John W. Casey (T) 416-365-6090	FINS #T009 QUID# NTDT
Sales Assistant: Sheldon Tweyman (T) 416-365-6033	DTC# 5043 EUROCLEAR#90098
1 First Canadian Place, 36 <sup>th</sup> Floor, Account Transfer Dept.	
Toronto, ON M5X 1HX T 416-359-5754	

**Step #4: Please notify Kids Help Phone** by returning a copy of the completed form to us. This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, your official tax receipt for income tax purposes and appropriate recognition. **The form can be sent to the attention of Janet Farrell via e-mail at [janet.farrell@kidshelpphone.ca](mailto:janet.farrell@kidshelpphone.ca), by fax: 416-586-0651, or through the mail at 439 University Ave. Suite 300, Toronto, ON, M5G 1Y8.**

**ADDITIONAL INFORMATION:** Please be advised that the value of the donation receipt will be based on the closing price of the security, on the day the securities are legally transferred to Kids Help Phone’s account at our custodial agent, BMO Nesbitt Burns, and in accordance with our Board Policy and Canada Revenue Agency regulations. It is our policy to sell donated securities as soon as possible after they have been received. The information provided here is general in nature and is not a substitute for independent legal or financial advice. It is the policy of Kids Help Phone to encourage our donors to seek independent counsel before making a significant gift.

# Letter of Authorization Gift of Publicly Traded Securities to Kids Help Phone



Please note that Kids Help Phone is unable to issue an income tax receipt until we are aware of your donation. In order to ensure prompt and accurate receipting of your donation, **prior to transferring publicly traded securities to our account, please fax, mail or email this form to:**

Kids Help Phone  
Attn: Janet Farrell  
300-439 University Avenue  
Toronto, ON M5G 1Y8  
P: 416-586-5437 x 8392  
F: 416-586-0651  
E: [janet.farrell@kidshelpphone.ca](mailto:janet.farrell@kidshelpphone.ca)

## Donor Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_

## Description of Securities

This letter will confirm my intention to donate the following securities to Kids Help Phone:

Name of Security \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_  
Name of Security \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_

## Your Broker/ Delivering Custodian Information

Name of Firm \_\_\_\_\_ Quantity \_\_\_\_\_ CUSIP/ISIN \_\_\_\_\_  
Name of Broker \_\_\_\_\_ Phone \_\_\_\_\_  
Account Name \_\_\_\_\_ Client Account Number \_\_\_\_\_

## Gift Designation

Highest Priority Needs  Specific Designation

## Donor Authorization

Signature \_\_\_\_\_ Date \_\_\_\_\_

## To transfer securities, please advise your broker of the following details:

BMO Nesbitt Burns Inc. Account No. 415-22902-11  
Investment Advisor: John W. Casey (T) 416-365-6090 FINS #T009 QUID# NTDT  
Sales Assistant: Sheldon Tweyman (T) 416-365-6033 DTC# 5043 EUROCLEAR#900981 First  
Canadian Place, 36<sup>th</sup> Floor, Account Transfer Dept. Toronto, ON M5X 1HX T 416-359-5754