

Oceana Canada  
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[OCEANA.CA](http://OCEANA.CA)

## Gift of Securities Transfer Form

Thank you for supporting Oceana Canada. Please complete this form and provide it to your broker to initiate the transfer of securities. Kindly also send a copy to Oceana Canada so we may track the gift and issue a charitable tax receipt.

Donating publicly traded securities directly to a registered charity eliminates capital gains tax on the appreciated value of those securities. Oceana Canada will issue a charitable tax receipt based on the fair market value of the securities on the date they are received in our brokerage account. Please notify Oceana Canada once the transfer has been initiated: [mhung@oceana.ca](mailto:mhung@oceana.ca)

### 1. Donor Information

Donor Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

### 2. Donor Broker Information

Broker Name: \_\_\_\_\_  
Brokerage Firm: \_\_\_\_\_  
Broker Telephone: \_\_\_\_\_  
Broker Email: \_\_\_\_\_

### 3. Securities to be Transferred

Name of Security: \_\_\_\_\_  
Number of Shares / Units: \_\_\_\_\_  
From Account Number: \_\_\_\_\_  
Estimated Market Value (optional): \_\_\_\_\_

### 4. Receiving Broker Information (Oceana Canada)

Broker: TD Direct Investing  
Account Name: Oceana Canada  
Broker Address: 77 Bloor Street West  
P.O. Box 5999, Station F  
Toronto, ON M4Y 2T1  
Broker Telephone: 1-800-465-5463  
Direct Trading Account Number: 20820JA  
FINS (Institution Number): T007  
CUID (Canadian Broker Code): GIST  
DTC (US Broker Code): 5036  
CRA Charity Registration Number: 821618139 RR 0001

**5. Authorization**

I hereby authorize the transfer in-kind of the securities described above from my account to the account of Oceana Canada.

Donor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Oceana Canada Contact**

Mohib Habib

Director, Finance and Administration

mhabib@oceana.ca