

## Instructions

Please fill out this form and send a copy to Operation Smile Canada (so we can issue the appropriate tax receipt) and your broker (so they can initiate the transfer).

### Contact Details for Operation Smile Canada

**MAIL:** ATTN: Ken Butland, CFRE  
Operation Smile Canada  
375 University Avenue, Suite 204  
Toronto, ON M5G 2J5

**EMAIL:** ken.butland@operationsmile.org

**FAX:** (289) 800-2487

**PHONE:** (647) 952-8229

### Transfer Details

#### RECEIVING INSTITUTION

TD Waterhouse Canada Inc.

#### ACCOUNT NAME

Operation Smile Canada Foundation

#### ACCOUNT NUMBERS

25B7Y5A (Canadian Securities)

25B7Y5B (US Securities)

**FINS #:** T007 **CUID #:** GIST **DTC #:** 5036

### Donor Details

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

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

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

I prefer to receive my charitable tax receipt: ☐ by email ☐ by mail

☐ I would like to receive periodic electronic communications from Operation Smile Canada.

### Broker Details

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

Institution: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

### Gift Details

Name of Security: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Gift Amount: \_\_\_\_\_

*Note: In accordance with CRA guidelines, the gift value will reflect the closing value of the securities on the day they are received by our account representative.*

Donor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**QUESTIONS?** Call Ken Butland, CFRE directly at (647) 952-8229 or toll-free at (844) 376-4530, extension 109.

# Gifts of Securities

## Why Donate Securities?

Thanks to a major tax incentive—the elimination of capital gains—you significantly increase both the size of your gift and your charitable tax credit when you donate securities instead of selling them and donating the proceeds. It's a win-win that can make a difference of hundreds and even thousands of dollars.

Looking to reinvest the proceeds of a sale of your securities? You considerably reduce your tax liability on the capital gain when you donate a portion of your publicly listed securities and sell the remainder.

These kinds of tax benefits extend to donations of shares acquired through employee stock options and flow through shares. Ask your financial advisor to show you the impact of a gift of securities. You might be amazed!

## Why Operation Smile Canada?

A donation of securities to Operation Smile Canada is a miracle for children born with facial deformities in many of the world's poorest countries. You provide them with life-saving, transformative surgeries performed by exceptional volunteer medical professionals who give freely of their time. It's a true partnership!

Operation Smile Canada emphasizes financial accountability and transparency, ensuring your kindness impacts more children's lives and brings hope to their families for a brighter future.

## It's Easy To Do

Simply fill out the *Securities Transfer Form* and follow the instructions.

*"Donating securities to Operation Smile is my preferred way to give because my gifts go much further than cash to help these children get the surgery they need."*

—  
**Lorne P.,**  
a longtime Operation Smile donor

