



Gifts of Stocks and Securities

By donating publicly traded securities – stocks, bonds, or mutual funds containing stocks listed on approved stock exchanges – you can receive a charitable donation receipt and avoid capital gains taxes.

How they work: Instead of selling your securities, which will trigger capital gains taxes to you, simply donate them directly to GVGS. In return, you receive tax credits based on the value of the stock donated.



Gift of Securities, must have a value of \$500 or greater.

There are multiple options – you can donate stocks, bonds and units of mutual funds. If you leave shares, stocks or securities to GVGS through your will, your estate will receive the same tax benefits.

1. If you have any questions prior to donating, please call Heather Gardiner at (250) 686 1054.
2. Download the [Gift of Securities Transfer Form](#). Sign, scan and send it to Greater Victoria Greenbelt Society at info@marylakeconnections.ca
3. Once the signed Transfer Form has been received and meets with GVGS's Gift Acceptance policies, you will be given our account information. You can then instruct your broker to initiate the trade to transfer your securities to our broker.
4. Once your gift has transferred successfully, a GVGS board member will contact you and issue a charitable tax receipt. As a general rule, the date of the donation shall be the later of the date the appropriate documentation is received or the date that the shares are deposited into GVGS's account. The value of the donation for tax purposes shall be the price ruling at close of business on the date of donation.

IMPORTANT: This information is general in nature and does not constitute legal or financial advice. It is not a substitute for professional advice. GVGS encourages you to seek professional legal, estate planning and/or financial advice before deciding upon your course of action. Some restrictions apply.