

# Stock Donation Acceptance Policy and Guidelines

## Introduction

This document applies to the receipt of stock donations through all fundraising activities of Waypoint Centre for Mental Health Care, including: general donation, annual giving; planned gifts; special fundraising initiatives; and campaigns.

This guideline may be altered from time-to-time in accordance with changes in income tax legislation, CRA policy and/or guidelines related to charitable giving, or Waypoint Centre policy.

## Acceptance of Shares

Waypoint Centre shall at all times reserve the right to accept or decline a donation of shares. As a general rule, Waypoint will only accept gifts of publicly traded stocks. **The value of such a donation is determined by the value of trading on the date of receipt of donation.**

## Tax Advice

Waypoint Centre will only provide reference on tax benefits. For specific tax advice on stock donations, donors should **consult their advisors on the rules governing deductibility of these gifts.**

## Stock Disposition Policy

All the stocks and securities Waypoint Centre receives from donors will be sold upon completion of the stock transfer without exception.

## Procedure

1. Authorization – Donor to complete the attached transfer form and forward it to his/her brokerage firm as well as to Waypoint Centre for Mental Health Fund Development Office, attention Holly Archer, Senior Development Officer, Major Gifts, [harcher@waypointcentre.ca](mailto:harcher@waypointcentre.ca); 705-427-0541.
2. Notification – the Director of Philanthropy will advise the Corporate Services office ([acctrec@waypointcentre.ca](mailto:acctrec@waypointcentre.ca)) and Waypoint Centre's brokerage firm about the transfer.
3. Confirmation - As soon as the transaction of stock transfer is completed, Waypoint Centre's brokerage firm will inform the Fund Development Office by email.
4. Disposition – Waypoint Centre's authorized officers will instruct its brokerage firm to sell the stocks on the very same day or before the end of the next trading day just in case the transfer comes in late in the day.
5. Recording – Once Waypoint's Fund Development Office has received confirmation notice of the sale (normally within one to two weeks of the transfer) from the Brokerage firm, the Fund Development Office will record the transaction accordingly in the database.
6. Receipting – the Fund Development Office will then issue the charitable tax receipt with name, number and value of shares of the date of the transfer of the shares to Waypoint Centre and distribute the charitable donation receipt to the donor.

# Waypoint Centre for Mental Health Care - Charitable Donation of Securities In-Kind Form

## **Donor Contact Information** (please note that same information will appear on the charitable tax receipt):

First Name:		Last name:	
Address:			
City		Province/Postal Code:	
Phone:		Email:	

## **Donor's Broker Contact Information (where the securities are currently being held):**

First Name:		Last Name:	
Firm:			
Address:			
Phone:		Email:	

## **Re: Letter of Release for a Securities Transfer to Waypoint Centre for Mental Health Care**

Please accept this letter as your instructions to transfer the following securities:

Number of shares	Name of shares	CUSIP number
Number of shares	Name of shares	CUSIP number
Number of shares	Name of shares	CUSIP number

from my account number \_\_\_\_\_ to Waypoint at the brokerage listed below. It is important that this transaction is completed no later than \_\_\_\_\_ (date). Please note that it can take up to seven days for transfers to be completed.

I authorize Waypoint Centre for Mental Health Care or its agents to contact my broker for purposes of concluding this transaction.

Donor's Signature: \_\_\_\_\_ Date: (MM/DD/YYYY): \_\_\_\_\_

### **TD Waterhouse**

**For the account of: Waypoint Centre for Mental Health Care; Account #1H7ZNKA**

TD Waterhouse Contact info:  
Debbie Bird, Client Service Associate  
33 Collier Street, 3<sup>rd</sup> Floor, Barrie ON L4M 1G5  
[deborah.bird@td.com](mailto:deborah.bird@td.com) 705-727-4847

FINS #: T007  
CUID: GIST

DEALER: TD Waterhouse  
DTC: 5036

Please send this form to: Holly Archer, Senior Development Officer at [harcher@waypointcentre.ca](mailto:harcher@waypointcentre.ca); and to Debbie Bird at TD Waterhouse at [deborah.bird@td.com](mailto:deborah.bird@td.com).

Charitable Registration Number: 83836 7027 RR0001