

Donating Shares from Securities or Mutual Funds to St Basils Under One Roof Campaign 2025-2027



A securities donation allows the donor to donate stocks and/or mutual funds. As long as the securities/mutual funds are in a non-registered investment account and can be traded on a stock market, you can donate shares or mutual funds to a charity (or charities) of your choice.

Benefits of Donating Securities

Reduce Capital Gains Taxes In most cases, donating appreciated stocks, mutual funds or stock options means you pay no tax on the capital gains. Or save your charitable tax credits for future tax returns within 5 years of the transaction.

Tax Receipts You receive the charitable tax receipt for the market value on the date the security is processed (sale of security).

One method is to use an existing online donation site such as Canada Helps. You may refer to their information on how to donate securities.

Another method is to work with the Finance Section of the Ottawa Diocese who can process the donation, forward the money to St Basils Under One Roof Campaign 2025-2027, and the Diocese will issue the tax receipt to the donor.

The procedure for working with the Diocese for a donation to St Basils Under One Roof Campaign 2025-2027 is described below:

- With your broker, complete the “Gift of Securities” form, either English or French.
- Send the completed form by email to the specific attention of Mrs France Hotte, CFO, Ottawa Diocese
 - Her address and contact information is on the form
 - Ask your broker to call her cell directly to advise of the Gift of Securities. Her mobile phone number is 613-793-0709

- On the form under Allocation of donation, for the purposes of donating to the “St Basils Under One Roof Campaign 2025-2027”, write that in as the allocation, and 100% as the amount.
- Your broker will use the Gift of Securities request and direction to transfer the specified shares to the Archdiocese of Ottawa-Cornwall brokerage account
 - This information is at the bottom of the form.
 - NOTE: While the form indicates an administrative fee of 3% of the total value of the shares sold, the CFO has advised the 3% fee is waived when 100% of the allocation is to a diocesan parish, in this case St Basils.
- The CFO monitors and tracks the deposit of securities into the Diocesan account.
- The Finance office then issues a letter to the parish (St Basils in this case) notifying the parish that person X has donated securities in the amount of \$\$\$\$.
- The Diocesan finance section then processes a direct deposit transfer to the parish (e.g. St Basils) bank account, attention Under One Roof Campaign 2025-2027.
- The Diocese will also issue the donation tax receipt to the donor - it does not come from St Basil's.

Please notify the parish (stbasilsparishfinance@gmail.com) when starting this process with the Diocese as this will help keep an eye on the donation activities and successful completion.

How long does this take? Once the process is started the diocese was unable to provide a specific timeline. It is suggested that one allow 2-3 weeks. If you wish to receive a tax receipt for the 2025 calendar year, it would be advised to start this process well before the end of year, such as in November 2025, to avoid disappointment.

Thank you for your significant contributions to the Under One Roof Campaign 2025-2027.