



Gift Acceptance Policy for donations of securities

1. Purpose

The purpose of this policy is to establish the guidelines governing the acceptance of securities donations made for the benefit of Chez Doris. It aims to ensure secure, transparent management in compliance with the requirements of the Canada Revenue Agency (CRA).

2. Scope

This policy applies to any individual, corporation, or institution wishing to donate securities to Chez Doris, including publicly traded shares, bonds, mutual fund units, or other marketable securities.

3. Donation Process

Before initiating any transfer of securities, donors are asked to fill out a securities donation form, available at Chezdoris.org.

It is recommended that this form be completed each year, even by recurring donors, to ensure the accuracy of information and compliance of the transfer.

4. Transfer Instructions

Once the form has been duly completed, donors are asked to send the document to their broker and copy Chez Doris (cc) at don-donation@chezdoris.org.

This will help ensure a smooth transfer of securities and the prompt issuance of a charitable tax receipt.

5. Issuance of Official Tax Receipt

An official donation receipt for income tax purposes will be issued for the fair market value of the securities at the close of business on the date the transfer is received by Chez Doris, in accordance with the rules established by the Canada Revenue Agency (CRA).

6. Sale of Securities

Upon receipt, the broker responsible for Chez Doris's account will immediately proceed with the sale of the transferred securities. This decision to liquidate is intended to minimize the risks associated with market fluctuations and to maximize the impact of the donation on the organization's programs.

7. Communication and Information

For any questions or to obtain the Securities Transfer Form, please contact:

Chez Doris – Philanthropy Department

514-937-2341 ext. 261

don-donation@chezdoris.org

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