



GIFT OF SECURITIES

A tax-smart way to donate to
United Way Perth-Huron

THE PROCESS IS SIMPLE

1. **Complete the Notification of Securities Transfer** (on reverse) and send it to United Way by email (securities@perthhuron.unitedway.ca) or by fax (519-273-9350) Attention – Securities
2. **Instruct your broker to transfer your securities to United Way’s brokerage account. Please do not transfer securities without first forwarding this form to United Way.**
United Way’s preferred broker: BMO Nesbitt Burns, Acct # 440-26112-16, DTC # 5043, CUID: NTDT, FINS # T009
3. **A charitable tax receipt** will be issued for the closing price of the securities on the day of the transfer to United Way. There is normally a delay between the time securities are received by United Way and when they are sold.
4. Eligibility of a tax receipt for the current year requires that securities must be in United Way’s brokerage account by 5 p.m. on December 31st of that year.

THE BENEFITS ARE CLEAR

If you sell a security, you pay tax on 50% of the capital gain

However, when you donate a gift of securities to United Way Perth-Huron the **taxable capital gain is completely eliminated**

AND

You receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way Perth-Huron receives the security

This multiplies the impact of the tax benefit of your charitable giving



An example of the tax benefit of donating Gifts of Securities to United Way:

	Sell security and give cash	Donate security "in kind"
Market value of security	\$10,000	\$10,000
Cost base	\$5,000	\$5,000
Capital gain	\$5,000	\$5,000
Taxable capital gain (50%)	\$2,500	\$0
Tax due on gain at Marginal Rate (Eg: 43%)*	\$1,075	\$0
Tax receipt for gift	\$10,000	\$10,000
Total Tax Credit*	\$3,976	\$3,976
Net tax savings	\$2,901	\$3,976

* Example uses Ontario federal and provincial combined tax rate

For more details on how United Way Perth-Huron handles gifts of securities, visit our website perthhuron.unitedway.ca/giving, call 519-271-7730 or email securities@perthhuron.unitedway.ca

Thank you for making a gift of securities to United Way Perth-Huron!

Disclaimer: This information is general in nature and does not constitute legal or financial advice. United Way Perth-Huron recommends that before making any gift of securities of any size, a donor consults with his/her professional financial advisor(s) for the tax, financial and/or estate planning implications. Individual circumstances differ and you are strongly encouraged to discuss with your own financial counsel to ensure your gift decisions are appropriate to your situation.



United Way
Perth-Huron

GIFT OF SECURITIES

Notification of Securities Transfer

As a service to our donors at or above Leadership level (\$1,200+) United Way is pleased to offer the option to donate gifts of securities. A minimum of \$1,200 **per type of share sold** must remain with United Way.

Please help us handle and acknowledge your gift appropriately by **emailing or faxing this form** to:
 Attention: Securities, United Way Perth-Huron, securities@perthhuron.unitedway.ca or (519)273-9350
In order to complete your donation, please contact your broker and arrange the share transfer
 United Way's preferred broker: BMO Nesbitt Burns, Acct # 440-26112-16, DTC # 5043, CUID: NTD, FINS #T009

GIFT DETAILS

Number of shares

Name of security

Approximate amount of donation

Expected date of transfer

Designation details

Please note: A minimum of \$1,200 net **per type of share sold** must remain with United Way.

As per United Way's Designation Services Fee Policy, a \$12 processing fee will be applied against each designation

I permit United Way to share my information (name, workplace, amount) with the organization(s) listed directly above

YOUR BROKER DETAILS

Broker Name

Financial Institution

Phone number

Email

DONOR DETAILS

Donor Name

Address

Phone number

Email

A charitable tax receipt will be issued electronically if an email address is provided above.

I would prefer to receive my tax receipt via mail

My Leadership gift (\$1,200 or more) may be publicly recognized by United Way.* Yes No

I would like my name to appear as: _____

I would like my donation attributed to my workplace campaign. Yes No

Workplace name

Signature of donor

Date

*For the full list of United Way's recognition levels, please see <https://www.perthhuron.unitedway.ca/giving>

United Way Perth-Huron Charitable Registration Number: 119278414RR0001