

# **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
- 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

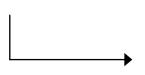
If you <u>sell</u> a security, you pay tax on 50% of the capital gain

However, when you <u>donate</u> 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

<sup>\*</sup> 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.



# **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 <a href="mailing-or-faxing-this-form"><u>emailing-or-faxing-this-form</u></a> to:
Attention: Securities, United Way Perth-Huron, <a href="mailing-securities@perthhuron.unitedway.ca"><u>securities@perthhuron.unitedway.ca</u></a> 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: NTDT, 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 As per United Way's Designation Services Fee Policy, a \$1	sold must remain with United Way. 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	Liliali	
DONOR DETAILS		
Donor Name	·	
Address		
DI I	- ·	
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		