

GIFT OF SECURITIES

A tax-smart way to donate to

The Benefits Are Clear

If you sell a security, you pay tax on 50% of the capital gain. However, if you donate a gift of securities to United Way 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 receives the security. This multiplies the impact of the tax benefit of your charitable giving.

The Process Is Simple

1. Notify the Executive Director of the United Way prior to the actual transfer of shares. We will then alert our Broker of the impending transaction.
2. Send the Share Transfer Form on the reverse of this page to your Investment Advisor. Instruct your Advisor to complete the form and initiate the transfer. *Your Investment Advisor must initiate the transfer of the gift.*
3. Have your Investment Advisor email the completed Share Transfer Form to wendy@unitedwaysaintjohn.com.

Thank you for your continued support of United Way. Your generous gift helps ensure a stronger and more caring community. United Way invests in a balanced, diversified portfolio of programs and initiatives that address Saskatoon and surrounding area's most pressing issues.

Gift of Publicly Traded Securities Transfer Form

To be completed by donor/financial advisor:

Date: _____

Name of Donor _____ Daytime telephone _____

Donor's Address _____ email _____

Donor's Workplace (if applicable) _____

Name of Donor's Broker _____ Broker's telephone _____

Firm _____

Name of Security _____ # of Shares Transferred _____

Approx Value of Each Share \$ _____ Approx. Total Value of Donation \$ _____

Date of Transfer _____

Dear Sir or Madam,

Please accept this letter as an authorization to donate _____ (#) shares of _____
currently held in my account _____ (Donor's account #) at _____
(name of financial institution) in the name of _____ (name of Donor).

Please arrange to transfer funds directly to the United Way of Greater Saint John, Account #

Signature of Donor: _____ Date of Request _____

Leadership Giving

Your gift of \$1,200 or more distinguishes you as a Leader of the Way. May we recognize your Leadership gift in published materials? _____ Yes _____ No

If yes, please print name(s) as you would like it to appear in print materials:

- | |
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| <ol style="list-style-type: none">1. Send a copy of this Form to your Transfer Out Department to send to the Transfer In Department.2. Email a copy of this form to wendy@unitedwaysaintjohn.com |
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