



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 alexya@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 the most pressing issues in Saint John, Kings & Charlotte.



ELECTRONIC SECURITIES TRANSFER FORM

This Stock Transfer Form is to be completed by the Donor or the Donor’s representative and serves as authorization and instruction to transfer specified securities to the United Way Saint John, Kings & Charlotte.

Security Name: _____ Exchange: _____

Security Ticker: _____

Donor’s Name: _____

Donor’s Account Number: _____

CUSIP Number: _____

Number of Shares: _____

Transfer Agent’s DTC Number: _____

Name of Transfer Agents
Contact
Person & Telephone Number: _____

United Way Saint John Kings & Charlotte Investor’s Group Client #: 2979454 Account #: 11623238

<u>Send to:</u>	<u>Also send a copy to:</u>
Investors Group contact person:	United Way Saint John, Kings & Charlotte contact person:
Krista Wetmore	Alexya Heelis
Investors Group	United Way Saint John, Kings & Charlotte
100 - 55 Union St, Saint John, NB E2L 5B7	28 Richmond Street, Saint John, NB E2L 3B2
Phone: 506-632-8930	Phone: 506-658-1214
E-mail: krista.wetmore@investorsgroup.com	E-mail: alexya@unitedwaysaintjohn.com

Please arrange to process this transaction immediately. This is my authorization to transfer the above securities from my account into the name and account of the United Way Saint John, Kings & Charlotte.

United Way will issue a tax receipt on the value at the close of business on the day securities are received.

Please forward a receipt in the name of:

_____	_____	_____	_____
Title	First Name	Initial	Last Name

Address			

_____	_____	_____	_____
City	Province/State	Postal Code	Country

_____	_____		
Phone	E-mail		

Signature (if required by broker)		Date	