

Gift of Securities Transfer Form

The Canada Revenue Agency does not apply a capital gains tax on publicly traded securities when they are donated directly to a charity.

HOW DOES THIS BENEFIT YOU?

When shares are sold, there are typically taxes on the capital gains, even if you plan to donate the proceeds. When you donate your securities directly to United Way Saint John, Kings & Charlotte the capital gains are not subject to tax, and you will benefit from a tax receipt for the full value of your eligible securities.

AN EXAMPLE:

If you purchase shares at \$1,000, and the value of those shares increases to \$2,500, the capital gains are \$1,500.

If you sell those shares and donate the proceeds, you will owe tax on the \$1,500 capital gains.

When you donate the shares directly to United Way Saint John, Kings & Charlotte, you do not have to pay the capital gains tax, and your net tax advantage will be larger.

	SELL SECURITIES AND DONATE PROCEEDS TO UNITED WAY	DONATE SECURITIES DIRECTLY TO UNITED WAY
Original cost of security	\$ 1,000	\$ 1,000
Market value of security	\$ 2,500	\$ 2,500
Capital gains	\$ 1,500	\$ 1,500
A Tax due on capital gains*	\$ 375	\$ 0
Donation	\$ 2,500	\$ 2,500
Tax credit on first \$200 (25%)	\$ 50	\$ 50
Tax credit on remainder (50%)	\$ 1,150	\$ 1,150
B Total tax credit from donation	\$ 1,200	\$ 1,200
B-A Net tax advantage	\$ 825	\$ 1,200

* These examples are based on an annual taxable income of less than \$202,800. Please consult a financial advisor to learn more.

TO DONATE SECURITIES

1. Complete the transfer form on the next page, sign, and email it to alexya@unitedwaysaintjohn.com.
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 Brokerage Account info:

CUID: NBCS

Address: 130 Kings St West, Suite 3000, Toronto, ON, M5X 1J9

Telephone: (416) 542-2200

DTC: 5008

Account: IG11623238

Dealer/Rep Number: 9737-YJ3J

Contact: Alyssa Shannon T: 506-333-9355, alyssa.shannon@ig.ca

3. A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to United Way.
4. Eligibility for a tax receipt for the current year requires that securities must be in United Way's brokerage account by 5PM on December 31st of that year.

Should you have any questions, please contact Alexya Heelis at (C)506-643-1383.

Donor Privacy: United Way Saint John, Kings & Charlotte is committed to protecting the confidentiality of donor data. The information you provide is used to process and recognize your donation, issue tax receipt and fulfill any specific donation requests. Visit unitedwaysaintjohn.com for more details.



United Way
Saint John, Kings
& Charlotte

Gift Details

Name of Security

Number of Shares Transferred

Approximate value of each share

Approximate value of donation

Donor Account Number

Broker Details

Broker Name

Transfer Agent DTC Number

Phone Number

Email

Donor Details

Donor Name

Address

Phone Number

Email

Donor Recognition:

My preferred recognition name for donor recognition is: _____

☐ Yes, my name may be included in a list of United Way donors.

Leadership Giving: By donating an annual gift of \$1,200 or more to United Way's Community Fund you join our group of "Leaders of the Way".

Tax Receipt:

I understand I will receive a charitable tax receipt from United Way Saint John, Kings & Charlotte based on the closing price of the day the stocks are received/transferred into United Way Saint John, Kings & Charlotte's brokerage account. To receive a tax receipt for the current year, the shares must be transferred/received by 5PM on December 31 of that year.

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.

Signature of Donor

Date

