



**United Way**  
Alberta Capital Region

# GIFT OF SECURITIES

## A tax-smart way to donate to United Way Alberta Capital Region

### THE PROCESS is simple ...

**Before making your donation** ... please be aware that, due to the administrative costs associated with processing this type of donation, United Way only accepts gifts of securities with a value of \$1,000 or more.

**When you are ready to donate** ... the process involves two easy steps:

- 1. Complete and send the Notification of Securities Transfer to United Way** (on reverse) and contact us to let us know to expect your donation. Please note that this form is for United Way's records only and does not initiate transfer of securities.
- 2. Instruct your broker to transfer your securities to United Way's brokerage account.**

If you have any questions, please don't hesitate to call us at (780) 990-1000 or send an email to [majorgifts@myunitedway.ca](mailto:majorgifts@myunitedway.ca)

### 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 Alberta Capital Region the **taxable capital gain is completely eliminated**

**AND**

**You receive a tax receipt for the full market value of the security** based on the closing trading price on the day United Way Alberta Capital Region receives the security.

*Demonstrates the impact of the tax benefit of your charitable giving*



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

	1. Sell security and give cash	2. Donate security "in kind"
<i>Market value of security</i>	\$10,000	\$10,000
<i>Cost base</i>	\$5,000	\$5,000
<i>Capital gain</i>	\$5,000	\$5,000
<i>Taxable capital gain (50%)</i>	\$2,500	\$0
<i>Tax due on gain at 39%</i>	\$975	\$0
<i>Tax receipt for gift</i>	\$10,000	\$10,000
<i>Value of tax receipt at 50%</i>	\$4,950	\$4,950
<b><i>Net tax savings</i></b>	<b>\$3,975</b>	<b>\$5,050</b>

*\*example uses Alberta federal and provincial combined tax rate*

**Donating Securities to United Way ... it's fast, it's easy and both you and your community benefit!**

# Gift of Publicly Traded Securities

## Transfer Form

To be completed by donor

First Name	Initial (s)	Last Name
Home Address	City/Province	Postal Code
Home Telephone	Home E-mail Address	
Name of Employer	Address of Employer	
Work Telephone/Ext.	Work Fax	Work E-mail Address
Name of Security	Number of Shares transferred	
Approx. value of each share	Approx. value of total donation	
Brokerage Firm	Your Brokerage Account Number (required to facilitate transfer)	
Investment Advisor	Advisor's Telephone Number	

### Transferring a Gift of Securities only takes 3 Steps:

1. Fax / deliver a copy of this form Attn: Major Gifts, United Way of the Alberta Capital Region (780.990.0203 confidential fax)
2. Fax / deliver this form to your investment Broker to transfer securities to United Way. **Your Investment Advisor must initiate the transfer of your gift.**
3. Once transfer is complete, we will contact you with the receipt value of your gift.

**Receiving Institution:** National Bank Financial (Edm.) Attn: Jill King Suite 3500, 10180-101 St. N.W.  
Edmonton, AB T5J 3S4  
Phone: (780) 412-6648  
Fax: (780) 423-4882

**Account Name/Number** United Way of the Alberta Capital Region  
ACC'T # **11RWØXA** FIN#: T80 CUIDS: NBCS DTC# 9139

I understand that I will receive a charitable tax receipt from United Way of the Alberta Capital Region based on the closing price of the shares on the day the shares are received/transferred into United Way's account at National Bank Financial. These securities have been transferred to United Way of the Alberta Capital Region without restriction. In order to receive a charitable tax receipt for the current year, the shares must have been transferred to United Way's account, or physically received by United Way of the Alberta Capital Region no later than close of markets the first week of December.

Signature of Donor \_\_\_\_\_ Date \_\_\_\_\_

### Leadership Giving

A gift of \$1,200 or more distinguishes you as a Leadership donor. 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

### Additional Tax Benefits of Making a Gift of Securities

Capital Gains realized on gifts of qualifying publicly listed securities to registered charities are exempt from tax. A capital gains inclusion rate of 0% will apply to this gift, when in comparison the capital gains inclusion rate on a triggered sale is 50%.

Contact your tax advisor to achieve maximum impact for your charitable gift.

Additional forms can be obtained on our website at [www.myunitedway.ca](http://www.myunitedway.ca)

For further information, please contact Major Gifts at 780-990-1000 or [majorgifts@myunitedway.ca](mailto:majorgifts@myunitedway.ca)

Charitable Registration #11926 0487 RR0001

### Tax Benefits of Charitable Giving

Alberta Tax Legislation supports Canadian charities. Combined federal and provincial income tax credits on charitable gifts made by Albertans are now 25.5% on the first \$200 and 50% on anything above the \$200 threshold.

