

GIFT OF SECURITIES

THE PROCESS

Complete the **Notification of Securities Transfer Form** (on reverse). Send a copy to your broker and a copy to the **Children's Foundation of Guelph and Wellington** by email (karyn@childrensfoundation.org).

Instruct your broker to transfer your securities to the Children's Foundation of Guelph and Wellington's brokerage account:

Broker: RBC Dominion Securities

Contact Person: Marc Morais, Associate Wealth & Investment Advisor

Email: marc.morais@rbc.com

Account No: 551-25225-16 CUID: DOMA DTC#: 5002 Receiving Institution: 9190

Account Name: The Children's Foundation of Guelph and Wellington

A **charitable receipt will be issued** for the closing price of the securities on the day of the transfer to the Children's Foundation of Guelph and Wellington. All securities are sold on the same day as received.

Children's Foundation Contact Person: Karyn Kirkwood, Senior Director of Development

Phone: 519-826-9551 Ext.128 Email: karyn@childrensfoundation.org

THE BENEFITS

If you sell a security, you pay tax on 50% of the capital gain.

However, when you donate a gift of securities 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 price on the day of the transfer.

This multiplies the impact of the tax benefit of your charitable giving.

	Selling 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 46%	\$1,150	\$0
Tax receipt for gift	\$10,000	\$10,000
Value of tax receipt at 46%	\$4,600	\$4,600
Net tax savings	\$3,450	\$4,600
Example uses Ontario Federal and Provincial combined tax		

Thank you for your support!

Children's Foundation of Guelph and Wellington, 5068 Whitelaw Rd, Unit 2, Guelph, ON N1H 6J3
www.childrensfoundation.org

Charitable Reg. No.: 140543430 RR0001

GIFT DETAILS

Number of shares: _____ Name of security: _____

Approximate amount of donation: _____ Expected date of transfer: _____

I/We would like this gift to support:

Where needed most Adopt-A-Family Food and Friends Free to Grow Scholarships

YOUR BROKER DETAILS

Broker Name: _____

Financial Institution: _____

E-mail: _____ Phone: _____

Your Account #: _____

DONOR DETAILS

Name: _____

Address: _____

City/Prov: _____ Postal Code: _____

E-mail: _____ Phone: _____

My gift may be publicly recognized by The Children's Foundation of Guelph and Wellington Yes No

I would like my name to appear as: _____

Signature: _____ Date: _____

Thank you for your support!

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