



## SIMPLE PROCESS

- 1. Complete the Notification of Securities Transfer** (on reverse) and send it to United Way by email (bpark@uwhh.ca) or by fax (905-527-5152)
- 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.**  
Joanne Goodrich and Rick Livingstone, RBC Dominion Securities Inc., 4475 North Service Road, Suite 400, Burlington, ON, L7L 4X7, email: joanne.goodrich@rbc.com  
Account #: 538-13815-1-5 CUID: DOMA , DTC # 5002, Dealer: 9190, Broker code GA6
- 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 of a tax receipt for the current year** requires that securities must be in United Way's brokerage account by 5 p.m. on December 31st of that year.

## CLEAR BENEFITS

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

However, when you donate a gift of securities to United Way Halton & Hamilton 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 Halton & Hamilton receives the security.

<b>An example of the tax benefit of donating Gift's of Securities to United Way:</b>		
	<b>Sell security and give cash</b>	<b>Donate Security "in-kind"</b>
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 Marginal rate (eg.43%*)	\$1,075	\$0
Tax receipt for gift	\$10,000	\$10,000
Total Tax Credit*	\$3,976	\$3,976
<b>Net Tax Savings</b>	<b>\$2,901</b>	<b>\$3,976</b>

*\*Example uses Ontario federal and provincial combined tax rate*

**Your gift of securities is helping many in your community, thank you!**

*Disclaimer: This information is general in nature and does not constitute legal or financial advice. United Way Halton & Hamilton recommends that before making any gift of securities of any size, a donor consults with his/her professional financial advisor(s) for the tax, financial and/or estate planning implications. Individual circumstances differ and you are strongly encouraged to discuss with your own financial counsel to ensure your gift decisions are appropriate to your situation.*



**United Way**  
Halton & Hamilton

# Gift of Securities

Notification of Securities Transfer

Your gift is important to us, please complete this form and send to  
bpark@uwhh.ca or Fax 905-527-5152

**Please contact your broker to arrange the share transfer to**

Joanne Goodrich and Rick Livingstone, RBC Dominion Securities Inc., 4475 North Service Road, Suite 400, Burlington, ON, L7L 4X7 | Account #: 538-13815-1-5 CUID: DOMA , DTC # 5002, Dealer: 9190,

## GIFT DETAILS

Number of Shares

Name of Security

Approximate amount of donation

Expected Date of Transfer

## YOUR BROKER DETAILS

Broker Name

Financial Institution

Phone Number

Email

## DONOR DETAILS

Donor Name

Address

Phone Number

Email

Signature

Date

A charitable tax receipt will be issued electronically if an email address is provided above.

I would prefer to receive my tax receipt via mail

My Leadership gift (\$1,200 or more) may be publicly recognized by United Way.\* Yes  No

I would like my name to appear as: \_\_\_\_\_

**United Way Halton & Hamilton Charitable Registration Number: 10746 2988 RR0001**

HALTON 101 - 4210 South Service Road, Burlington, ON L7L 4X5 T: 905-635-3138 | 1-844-392-7639 | F: 905-632-1918

Burlington

Halton Hills

Hamilton

Milton

Oakville