



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 (905-632-1918)
- 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.**
Investment Advisor, Rick Livingstone, RBC Dominion Securities Inc., 4475 North Service Road, Suite 400, Burlington, ON, L7L 4X7, email: charmaine.savage@rbc.com, Senior Associate
Account #: 538-13815-1-5 CUID: DOMA , DTC # 5002, Dealer: 9190, Broker code GE7
- 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 may be eliminated.

AND

You receive a tax receipt for the full market value of the gift, based on the close price of the security on the day it is received by United Way Halton & Hamilton.

An example of the tax benefit of donating Gift’s of Securities to United Way:		
	Sell 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 Marginal rate (eg.43%*)	\$1,075	\$0
Tax receipt for gift	\$8,925	\$10,000
Total Tax Credit*	\$3,873	\$4,340
Net Tax Savings	\$2,798	\$4,340

**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 905-632-1918

Please contact your broker to arrange the share transfer to

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