

GIFTS OF SECURITIES TRANSFER FORM



Leadership Donors
United to lead change.

1 MY CONTACT INFORMATION *Required Field

☐ Ms. ☐ Mrs. ☐ Mr. ☐ Dr. First Name* _____ Initial(s) _____ Last Name* _____

Home Address* _____ City/Province* _____ Postal Code* _____

Home Phone (_____) _____ - _____ Email (H) _____ Year of Birth _____

Work Phone (_____) _____ - _____ Email (W) _____

Employer Name _____ Employee No. _____ Gender ☐ F ☐ M ☐ Transgender ☐ Other Specific _____

2 MY DONATION You may select more than one option.

Programs and initiatives evaluated[†] by United Way for sustainable impact against a root cause.

DIRECT my donation to where it is NEEDED MOST in the community.^{††}

or I want to support the following United Way investment areas:

Poverty - Basic Needs, Financial Stability, Employment Skills

Kids - Developmental Milestones, Positive Self-empowerment, Transition to Adulthood

Communities - Strong Communities, Connecting People to Networks and Resources

Tomorrow Fund (United Way's legacy fund)

_____ %

_____ %

_____ %

_____ %

_____ %

TOMORROW FUND

Please consider a Planned Gift as part of your long-term tax, financial, and estate planning strategies.

☐ I have already made provisions in my estate plans or Will to support United Way.

☐ Please contact me about United Way gift and estate planning opportunities.

I want to support another registered Canadian charity and I understand this charity is not evaluated[†] by United Way.

25% of the receipted value of your gift must remain with United Way, and a \$16 processing fee is subtracted for each designation to cover the cost associated with your designation.

For information on Canadian charities, visit: canada.ca/en/revenue-agency/services/charities-giving/charities-listings.html.

\$ _____

Specify Canadian Charity _____

☐ Do not release my name to the charity

Registered Charity Number** _____

[†]Evaluation includes due diligence around financial stability and governance.

^{††}Should the area you choose to designate your gift be fully funded by the time of your donation, United Way will ensure your funds are directed to the next most urgent priority need.

**In order for us to process your designation, you must provide us with a registered charity number.

3 OTHER DETAILS

Financial Broker _____

Broker Phone _____ Broker Email _____

Delivering Institution _____ Donor Account Number _____

Security Name _____ Symbol _____

Exchange Name _____ Number of Transferred Shares _____

TAX RECEIPTS

Tax receipts are issued by Feb. 28, 2021.

☐ Receive your tax receipt via email. If you have selected email, please ensure it is provided in section 1.

☐ Send receipt via mail.

4 SIGN AND DATE *Required Field

DONOR RECOGNITION

A donation of \$1,200 or more distinguishes you as a United Way Leadership Donor in publications.

May we recognize your donation?

☐ YES

☐ NO, I wish to remain anonymous

If yes, please print name(s)

as you would like it to appear: _____

(e.g. John & Jane Doe, Doe Family, etc.)

Please authorize your donation by signing*: _____ Date: _____



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, 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, 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*	\$ 315	\$ 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	\$ 885	\$ 1,200

* These examples are based on an annual taxable income of \$200,000. Please consult a financial advisor to learn more.

TO DONATE SECURITIES

1. Complete the transfer form on the next page, sign, and fax or scan it to United Way at 403-410-1873 or email it to securities@calgaryunitedway.org. Please note that your donation must have a value of \$1,000 or more.
2. Once the signed transfer form has been received and approved by United Way, you will receive United Way's brokerage account information. At that time, please instruct your broker to initiate the trade to transfer your securities to United Way. This transfer must be received no later than December 16, 2020 for a 2020 tax receipt.
3. The value of your tax receipt will be calculated based on the closing price of the security on the day it is received by United Way.

Should you have any questions, please contact our Gift of Securities Coordinator at 403-410-2578.

DONOR PRIVACY – United Way of Calgary and Area complies with the Association of Fundraising Professionals' Donor Bill of Rights and is committed to protecting the privacy of your personal information. The information you provide is used to assist in the administration and acknowledgement of your gift, to issue tax receipts, and to fulfill your information questions. We do not release donor names unless requested by the donor. For more information, please visit calgaryunitedway.org.

calgaryunitedway.org



United Way
Calgary and Area