



## SIMPLE PROCESS

- 1. Complete the Notification of Securities Transfer** (on reverse) and send to Sherrie Bonaldo by email at [sherrie@unitedwayniagara.org](mailto:sherrie@unitedwayniagara.org) or fax to 905-688-2997 Attn: Sherrie Bonaldo, Manager, Individual Giving
- 2. Instruct your broker to transfer your securities to United Way's Brokerage account below. Please do not transfer securities without first sending this form to United Way.**

*RBC Dominion Securities*

Suite #400 - 63 Church Street, St. Catharines, ON L2R 3C4  
(905) 988-5888

Contact Person: Debbie Warren email: [debbie.warren@rbc.com](mailto:debbie.warren@rbc.com) or 905-988-5703

Account #: 5812825510, CUID: DOMA , DTC # 5002

- 3. A charitable tax receipt** will be promptly issued for the closing price of the securities on the day of the transfer to United Way. 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 Niagara 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 Niagara receives the security.

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	\$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 Niagara recommends that before making any gift of securities of any size, a donor consults with their 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**  
**Niagara**

# Gift of Securities

Notification of Securities Transfer Form

Your gift is important to us. Please complete this form and send to [sherrie@unitedwayniagara.org](mailto:sherrie@unitedwayniagara.org) or Fax to 905-688-2997 Attn: Sherrie Bonaldo, Manager, Individual Giving

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

RBC Dominion Secuties Attn: Debbie Warren  
Suite #400 - 63 Church Street, St. Catharines, ON L2R 3C4  
Account #: 5812825510, CUID: DOMA , DTC # 5002

## 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 to the address listed above.

My gift of \$500 or more may be publicly recognized by United Way      Yes      No

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

**United Way Niagara Charitable Registration Number: BN13053 2443 RR0001**