

# GIFTS OF SECURITIES TRANSFER FORM



**Leadership Donors**  
United to lead change.

## 1 MY CONTACT INFORMATION \*Required Field

Title \_\_\_\_\_ 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<sup>†</sup> by United Way for sustainable impact against a root cause.

**DIRECT my donation to where it is NEEDED MOST in the community.**<sup>††</sup>

%

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)

%

I want to support another registered Canadian charity and I understand this charity is not evaluated<sup>†</sup> by United Way.

25% of the receipted value of your gift must remain with United Way.

For information on United Way's designation processing fee, visit: [calgaryunitedway.org/faqs](http://calgaryunitedway.org/faqs).

For information on canadian charities, visit: [canada.ca/en/revenue-agency/services/charities-giving/charities-listings.html](http://canada.ca/en/revenue-agency/services/charities-giving/charities-listings.html).

\$

Specify Canadian Charity \_\_\_\_\_

Registered Charity Number\*\* \_\_\_\_\_

Do not release my name to the charity

<sup>†</sup>Evaluation includes due diligence around financial stability and governance.

<sup>††</sup> 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.

### 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.

## 3 OTHER DETAILS

Financial Broker \_\_\_\_\_

Broker Phone \_\_\_\_\_ Broker Email \_\_\_\_\_

Delivering Institution \_\_\_\_\_

Security Name \_\_\_\_\_ Symbol \_\_\_\_\_

Exchange Name \_\_\_\_\_ Number of Transferred Shares \_\_\_\_\_

### TAX RECEIPTS

Donations received by Dec 31 are issued tax receipts by Feb 28 the following year (except payroll donations - recorded on Box 46 of your T4)

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
<b>A Tax due on capital gains*</b>	<b>\$ 315</b>	<b>\$ 0</b>
Donation	\$ 2,500	\$ 2,500
Tax credit on first \$200 (25%)	\$ 50	\$ 50
Tax credit on remainder (50%)	\$ 1,150	\$ 1,150
<b>B Total tax credit from donation</b>	<b>\$ 1,200</b>	<b>\$ 1,200</b>
<b>B-A Net tax advantage</b>	<b>\$ 885</b>	<b>\$ 1,200</b>

\*These examples are based on an annual taxable income of \$235,675. Please consult a financial advisor to learn more.

### TO DONATE SECURITIES

1. Complete the transfer form on the next page, sign, and scan it to United Way at 403-410-1873 or email it to [securities@calgaryunitedway.org](mailto: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. The deadline to initiate a transfer is December 15, 2023 for a 2023 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 Professional's 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](http://calgaryunitedway.org).

