

## 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

Employer Name Employer No.

## 2. MY DONATION *You may select more than one option*

Direct my donation to the  
**COMMUNITY IMPACT FUND**  
(To be used where it is needed most in the community.)

Amount: =  %

**AND/OR** I want to support another United Way initiative<sup>†</sup>:

Amount: =  %

### TOMORROW FUND

Leaving a planned gift provides you with the opportunity to create a bright future for the next generation of Calgarians.

My estate plans or Will support United Way

I would like to learn more about United Way's Tomorrow Fund and planned giving opportunities.

If you would like a portion of your donation (less United Way's processing expenses\*) designated to another registered Canadian charity, please provide the information below.

25% of the receipted value of your gift must remain with United Way  
For more information on Canadian charities, visit: [apps.cra-arc.gc.ca/ebci/hacc/srch](https://apps.cra-arc.gc.ca/ebci/hacc/srch)

Specify Canadian Charity Amount:\$

Registered Charity Number\*\* Do not release my name to the charity

<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.

\*\$16 per designation per year for United Way's processing expenses to other charities will be applied, more information can be found at: [calgaryunitedway.org/about-us/faqs](https://calgaryunitedway.org/about-us/faqs).

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

## 3. OTHER DETAILS

Financial Broker (if applicable) Broker Self-Directed

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)

I would like to receive my tax receipt via email. (If selected please ensure your email is provided in section 1).

I would like to receive my tax receipt via mail.

## 4. SIGN AND DATE *\*(Required Field)*

### DONOR RECOGNITION

A donation of \$1,200 or more recognizes you as a United Way 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\*:**

\*Can be original or e-signature

**Date:**

(mm/dd/yyyy)

# THANK YOU

**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 acknowledgment 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](https://calgaryunitedway.org). United Way of Calgary and Area estimates fundraising and related operating costs to be **14% - 16%**



## TO DONATE SECURITIES

1. Complete the donations form on the preceding page, sign, 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 donation 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 11, 2026, for a 2026 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. A notification detailing the final amount will be sent out to you after the securities are received by United Way.

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

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