GIFT OF SECURITIES DONATION FORM

United Way Calgary and Area

uway@calgaryunitedway.org
403-410-1863
calgaryunitedway.org

410–919 11 Ave SW,
Calgary, AB, T2R 1P3

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†:

_____

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

Specify Canadian Charity _____ **Amount: = $**_____

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

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

2. 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*: _____ **Date:** _____
(mm/dd/yyyy)

*Can be original or e-signature

THANK YOU

Our Privacy Promise: Your support is very important to us. We value your privacy, and we will not sell or trade your name with other organizations. Charitable #13022 9750 RR0001. This year, United Way of Calgary and Area aims to match last year's fundraising success, with a goal of surpassing $50 million to support our community. It will cost approximately 14% to 16% of the total to raise this, well below the Canada Revenue Agency's acceptable level of 35%. The funds from this campaign will support the greatest needs or will be used as directed by the donor. For further information, please contact United Way at (403) 231-6265. Our address is 410–919 11 Avenue SW Calgary, AB T2R 1P3 and we are incorporated in Alberta.

UNITED WE CAN.

When you give to United Way of Calgary and Area, you give to where its needed most in the community. This crucial funding stays in Calgary and the surrounding area, helping us meet both existing and emerging needs.

How To Donate a Gift of Securities

Getting started is simple. *Please note donations must have a value of $1,000 or more.*

1. **Complete the Gift of Securities Donation form:** calgaryunitedway.org/securitiesform
2. **Email completed form** securities@calgaryunitedway.org
3. **United Way sends brokerage account information,** and you can instruct your broker to initiate the trade to transfer the securities*
4. **Your tax receipt is calculated** based on the closing price of the security on the day it is received by United Way

Once the shares are received, United Way will confirm the value and issue your charitable tax receipt, generally based on the closing price on the day the donation is accepted.
If you have any questions or require assistance, contact our Gift of Securities Coordinator** by phone at (403) 410-2578 or email at securities@calgaryunitedway.org.

*Some restrictions apply. To download the Gift of Securities policy, visit: calgaryunitedway.org/acceptance-of-gifts-policy/
**Any gift planning should be done in consultation with your financial or tax advisor.

THE MORE YOU GIVE, THE MORE YOU GET BACK

SCAN HERE
to find out how far your donation can go and the tax benefits you'll receive.

Your gift may be matched, doubling your impact!

Find out if your gift qualifies at calgaryunitedway.org/match



We see the need. United, we can meet it. Donate today.

calgaryunitedway.org/donate

United Way
Calgary and Area