

GIFT OF SECURITIES

Donation Form



myunitedway.ca
majorgifts@myunitedway.ca
780-990-1000

15132 Stony Plain Road
Edmonton, AB T5P 3Y3

Please initiate the transfer of securities and submit this form to United Way no later than **December 10** to guarantee a charitable tax receipt for this year. Gifts made after this date are not guaranteed a receipt for the current year.

MY PERSONAL INFORMATION & PREFERENCES (*Required Field)

Title _____ First Name* _____ Initial(s) _____ Last Name* _____
Home Address* _____ City/Province* _____ Postal Code* _____
Home Phone* _____ Personal Email* _____ Year of Birth _____

RECOGNITION

☐ I would like my spouse to also be recognized for this gift. Spouse Name _____

☐ I would like my donation attributed to my workplace campaign. Workplace Name _____

Work Email _____

Preferred Recognition Name* _____
(as you'd prefer it to appear, including name of spouse if applicable)

TAX RECEIPTS Security donations processed by December 31 will be issued tax receipts by February 28 of the following year. I would like to receive my tax receipt via: ☐ Personal Email ☐ Regular Mail

MY DONATION

☐ Direct my donation to United Way's strategic programs **where most needed.**

(specify United Way program or initiative if desired) _____

Approximate
Donation
Amount* _____

MY TRANSFER DETAILS

INVESTMENT ADVISOR CONTACT (if applicable)

Name of Advisor _____ Phone Number _____
Name of Firm _____ Email Address _____

SECURITIES INFORMATION

Name of Security _____ Account Name _____
Account Number _____ Approximate Value of Each Share _____
of Shares _____ Date of Transfer _____

AUTHORIZATION

I understand that I will receive a charitable tax receipt from United Way of the Alberta Capital Region based on the closing price of the shares on the day the shares are received/transferred into United Way's account at National Bank Financial. These securities have been transferred to United Way of the Alberta Capital Region without restriction.

Signature of Donor



Date Signed _____

LEGACY GIVING

Leaving a planned gift provides an opportunity to create a bright future for the next generation.

☐ My estate plans or Will support United Way.

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

THANK YOU!

Privacy Notice | United Way of the Alberta Capital Region protects your personal information in accordance with the Canadian Standards Association (CSA) privacy principles. We collect only what is needed to issue charitable tax receipts and maintain donor relationships, and we never sell personal information or donor lists. For more information, visit myunitedway.ca/privacy or contact our Privacy Officer at 780-990-1000 or privacyofficer@myunitedway.ca

GIFTS OF SECURITIES

The Benefits are Clear

A tax-smart way to donate to United Way of the Alberta Capital Region, donating securities is fast, easy, and beneficial for both you and your community!

If you sell a security, you pay tax on 50% of the capital gain. However, if you donate a gift of securities, the taxable capital gain is completely eliminated AND you receive a tax receipt for the full-market value of the security based on the closing trading price on the day United Way receives the security. For example:

	Sell Security, Donate Cash	Donate Security Direct to United Way
Current Market Value	\$10,000	\$10,000
Original Purchase Price	\$2,000	\$2,000
Capital Gain	\$8,000	\$8,000
Taxable Capital Gain (50%)	\$4,000	\$0
Tax Payable on Gain (40%*)	(\$1,600)	\$0
Charitable Tax Credit (51%)	\$5,050	\$5,050
Donation Amount After Tax <small>Charitable Tax Credit – Tax Payable on Gain</small>	\$3,450	\$5,050

Increases your impact in community by **\$1,600!**

*Assume 40% marginal tax rate. Please visit Canada Revenue Agency's [website](#) or speak to a financial advisor for a detailed analysis of how tax credits can apply to you.

Transfer a Gift of Securities in 3 Easy Steps

1 Complete the Form Provide the information requested on the reverse of this page. Please note that due to administrative costs, United Way only accepts gifts of securities with a value of \$1,000 or more.	2 Notify Your Advisor Provide a copy of this form to your investment advisor or bank to initiate the transfer of securities to United Way's brokerage account at National Bank Financial.	3 Alert Us (and our Bank!) About Your Gift Send a copy of the completed form to United Way at majorgifts@myunitedway.ca , as well as our receiving institution using the contact information below.
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United Way of the Alberta Capital Region Brokerage Account Information:

Receiving Institution	National Bank Financial Suite 1800, 10175 – 101 Street NW Edmonton, AB T5J 0H3	Attention: Jane Alm or Gavin Gyte Phone: 780-412-6644
Account Details	United Way of the Alberta Capital Region Account #: 11RW0XA FIN#: T80	Charitable Registration #: 11926 0487 RR0001 CUIDS: NBCS DTC# 5008