



The Benefits are Clear

A tax-smart way to donate to United Way of the Alberta Capital Region. Donating Securities to United Way 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:

	Cash Gift of Sold Securities	In-kind Security Donation
Market Value	\$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 48%	\$1,200	\$0
Tax Receipt for Gift	\$10,000	\$10,000
Value of Tax Receipt at 50%	\$4,950	\$4,950
Net Tax Savings	\$3,750	\$4,950

*Example uses the highest federal and provincial combined tax rate. Please note that due to the administrative costs, United Way only accepts gifts of securities with a value of \$1,000 or more.



“Each year, my wife and I use our stocks and securities to make our donation to United Way. This allows us to take advantage of the significant tax savings and other benefits, while enabling us to help eliminate poverty in our community.”

– Don Gordon, United Way donor

Please don't hesitate to contact us at (780) 990-1000 or majorgifts@myunitedway.ca with any questions.

Publicly Traded Securities Transfer Form

To be completed by donor



United Way
Alberta Capital Region

First Name	Initial (s)	Last Name
Home Address	City/Province	Postal Code
Home Telephone	Home E-mail Address	
Name of Employer		
Name of Security	Number of Shares transferred	
Approx. value of each share	Approx. value of total donation	
Brokerage Firm	Your Brokerage Account Number (required to facilitate transfer)	
Investment Advisor	Advisor's Telephone Number	

Transferring a Gift of Securities in Three Easy Steps:

In order to receive a charitable tax receipt for the current year, the shares must have been transferred to United Way's account, or physically received, no later than close of markets the first week of December.

1. **Email or fax a copy of this form** Attn: Darren Brennan, United Way of the Alberta Capital Region to dbrennan@myunitedway.ca or fax 780.990.0203 (confidential copy).
2. Send this form to your investment Broker to transfer securities. **Your Investment Advisor must initiate the transfer of your gift.**
3. Once transfer is complete, we will contact you with the receipt value of your gift. **Receiving Institution:** National Bank Financial

Attn: Jane Alm or Gavin Gyte
Suite 1800, 10175 - 101 St. N.W.
Edmonton, AB T5J 0H3

Phone: (780) 412-6644
Fax: (780) 423-4882

Account Information: United Way of the Alberta Capital Region
ACC'T # 11RWØXA FIN#: T80

Charitable Registration #11926 0487 RR0001
CUIDS: NBCS DTC# 5008

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
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A gift of \$1,200 or more distinguishes you as a Leadership Donor and a gift of \$10,000 or more distinguishes you as a Pathfinder. May we recognize your Leadership or Pathfinder gift in published materials?

☐ Yes ☐ No

If yes, please print name(s) as you would like it to appear.
