

GIFT OF SECURITIES Donation Form



United Way
Alberta Capital Region

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.

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

15132 Stony Plain Road
Edmonton, AB T5P 3Y3

1 MY PERSONAL INFORMATION & PREFERENCES *Required Field

First Name* _____ Initial(s) _____ Last Name* _____ Company _____

Address* _____ City/Province* _____ Postal Code* _____

Preferred 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)

2 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***

\$ _____

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.

3 MY TRANSFER DETAILS

Name of Advisor _____ Phone _____

Name of Firm _____ Firm CUID/DTC _____

Email Address _____

Name of Security _____ CUSIP/ISIN _____

Account Name _____ Account Number _____

Number of Shares _____

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

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 ATB Securities Inc. These securities have been transferred to United Way of the Alberta Capital Region without restriction.



Signature of Donor _____ **Date Signed** _____

4 INSTRUCTIONS

This form is to be completed by the donor and serves as authorization and instruction to transfer specified securities to United Way of the Alberta Capital Region. The completed form can be sent by email to the donor's broker/investment advisor and to United Way at majorgifts@myunitedway.ca. Please note our receiving firm, ATB Securities Inc., will be unable to proceed with the sale of securities until this form is sent by you or your broker to the aforementioned parties.

United Way of the Alberta Capital Region Brokerage Account Information:

RECEIVING INSTITUTION

ATB Securities Inc.
3699 63 Ave NE
Calgary, AB T3J 0G7

Attention: Desmond Chow, IA: Code: 6720, Dealer Code: 7771
Phone: 780-887-9381 Fax: 403-541-4252
Email: transfers.atbsi@atb.com

ACCOUNT DETAILS

United Way of the Alberta Capital Region
Account #: EF0-1441-A

Charitable Registration #: 11926 0487 RR0001
CUID: ATBS DTC#: Contact transfers.atbsi@atb.com for instructions

THANK YOU!

GIFT OF SECURITIES

The Benefits of Donating Securities

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.

By donating securities, you can:

- **Eliminate capital gains tax on appreciated investments**
- **Receive a charitable tax receipt for the full market value of the securities**
- **Maximize the impact of your philanthropic giving**
- **Support local programs and services that help individuals and families across our region**
- **Leave a lasting legacy in your community through a simple and efficient giving option**

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 Charitable Tax Credit – Tax Payable on Gain	\$3,450	\$5,050

Increase 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 ATB Securities Inc.

3

ALERT US ABOUT YOUR GIFT:

Send a copy of the completed Gift of Securities Donation form to United Way at majorgifts@myunitedway.ca

Should you have any questions, please contact our United Way Team at 780-990-1000.

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

15132 Stony Plain Road, Edmonton, AB T5P 3Y3 ☎ 780-990-1000 ✉ majorgifts@myunitedway.ca 🌐 myunitedway.ca