



United Way
City of Kawartha Lakes

GIFT OF SECURITIES

A tax-smart way to give to
United Way for the City of
Kawartha Lakes

THE PROCESS IS SIMPLE

1. Complete the Notification of Securities Transfer Form (on reverse) and send it to United Way by email (taryn@ckl.unitedway.ca) or by fax (705-878-0475, Attention: Taryn Zylstra).
2. Instruct your broker to transfer your securities to United Way's brokerage account. Please do not transfer securities without first forwarding this form to United Way.
3. A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to United Way. All securities are sold on the same day as received by United Way.

THE BENEFITS ARE CLEAR

If you SELL a security, you pay tax on 50% of the capital gain.

However, when you DONATE a gift of securities to United Way CKL the taxable capital gain is completely eliminated

AND

You receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way CKL receives the security.

This multiplies the impact

of the tax benefit of your charitable giving →

An example of the tax benefit of donating Gifts of Securities to United Way:

	SELL security and	DONATE security
Market value of security	\$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 46%*	\$1,150	\$0
Tax receipt for gift	\$10,000	\$10,000
Value of tax receipt at 46%*	\$4,600	\$4,600
Net tax savings	\$3,450	\$4,600

*Example uses Ontario federal and provincial combined tax rate

Thank you for making a gift of securities to United Way CKL!

Receiving Firm:
TD Waterhouse

Account name: United Way for the City of
Kawartha Lakes
Account number:#0555x3 AB
BBS FINS#: CUID/DCS: GIST

Dealer Code: 9265
Representative Code:
FINS: T007



United Way
City of Kawartha Lakes

GIFT OF SECURITIES

Notification of Securities Transfer Form

Please help us handle and acknowledge your gift appropriately by **emailing or faxing this form** to:

Attention: Taryn Zylstra, Bookkeeper
taryn@ckl.unitedway.ca or 705-878-5081

In order to complete your donation, please contact your broker and arrange the share transfer.

A gift of securities must be a minimum of \$1,000.

In accordance with United Way policy, all shares are sold immediately.

GIFT DETAILS

Number of shares

Name of security

Approximate amount of donation

Expected date of transfer

Designation details (please note: A minimum of \$1,000 must remain with United Way)

YOUR BROKER DETAILS

Broker Name

Financial Institution

Phone number/Email address

Donor's Account Number

DONOR DETAILS

Donor Name

Address

Phone/Fax

Email

My Leadership gift (\$1,200 or more) may be publicly recognized by United Way*

Yes

No

I would like my name to appear as: _____

I would like my donation attributed to my workplace.

Yes

No

Workplace Name

Signature of _____

_____ Date