



THE PROCESS IS SIMPLE

1. Complete the Notification of Securities Transfer Form (on reverse) and send it to United Way by email (marge@uwock.ca) or by fax (226-270-5535, Attention: Margery Muharrem).
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 of Chatham-Kent 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 of Chatham-Kent 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 of Chatham-Kent!

Receiving Firm: BMO Nesbitt Burns Attention: Joel Boisvert	Account name: United Way of Chatham-Kent Account number: 44517396-11 BBS FINS#: CUID/DCS: NTDT	Dealer Code: 9185 Representative Code: PE6 FINS: T009
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United Way
Chatham-Kent

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: Margery Muharrem, Individual Donor & Major Gifts Associate
marge@uwock.ca or 519.354.0430 x274
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 donor

Date