

The Canada Revenue Agency does not apply a capital gains tax on publicly traded securities when they are donated directly to a charity.

HOW DOES THIS BENEFIT YOU?

When shares are sold, there are typically taxes on the capital gains, even if you plan to donate the proceeds. When you donate your securities directly to United Way, the capital gains are not subject to tax, and you will benefit from a tax receipt for the full value of your eligible securities.

AN EXAMPLE:

If you purchase shares at \$1,000, and the value of those shares increases to \$2,500, the capital gains are \$1,500.

If you sell those shares and donate the proceeds, you will owe tax on the \$1,500 capital gains.

When you donate the shares directly to United Way, you do not have to pay the capital gains tax, and your net tax credit will be larger.

	SELL SECURITIES AND DONATE PROCEEDS TO UNITED WAY	DONATE SECURITIES DIRECTLY TO UNITED WAY
Original cost of security	\$ 1,000.00	\$ 1,000.00
Market value of security	\$ 2,500.00	\$ 2,500.00
Capital gains	\$ 1,500.00	\$ 1,500.00
A Tax due on capital gains (50%)*	\$ 330	\$ 0
Donation	\$ 2500.00	\$ 2500.00
Tax credit on first \$200 (20.06%)	\$ 40.12	\$ 40.12
Tax credit on remainder 43.7%	\$ 1005.10	\$ 1005.10
B Total tax credit from donation	\$ 1045.22	\$ 1045.22
B-A Net tax credit	\$ 715.22	\$ 1045.22

* These tax charts are based on an annual taxable income of less than \$200,000 and the federal and provincial donation tax credit rates ruling as of January 1, 2017. Please consult a financial advisor to learn more.

TO DONATE SECURITIES

1. Complete the transfer form on the next page, sign, and fax or scan it to United Way at (250) 562-8102 or email it to info@unitedwaynbc.ca. Please note that your donation must have a value of \$1,000 or greater.
2. Once the signed transfer form has been received and approved by United Way, you will receive United Way's brokerage account information. At that time, please instruct your broker to initiate the trade to transfer your securities to United Way. This transfer must be received no later than December 16th, 2017 for a 2017 tax receipt.
3. The value of your tax receipt will be calculated based on the closing price of the security on the day it is received by United Way.

DONOR PRIVACY – We are committed to protecting the privacy of your personal information. The information you provide will be used to assist in the administration and acknowledgement of your gift, to issue tax receipts, and to fulfill your information requests. We do not release donor names unless requested by the donor.

www.unitedwaynbc.ca



United Way
Northern British Columbia
Change starts here.



1 MY CONTACT INFORMATION

Ms. Mrs. Mr. Dr. First Name _____ Initial(s) _____ Last Name _____
Home Address _____ City/Province _____ Postal Code _____
Home Phone (____) _____ - _____ Email (H) _____
Work Phone (____) _____ - _____ Email (W) _____
Employer Name (if applicable) _____ Optional: Gender M F Year of Birth _____

2 OTHER DETAILS

Financial Broker _____ Broker Phone _____
Broker Email _____ Delivering Institution _____
Donor Account Number _____ Security Name _____
Symbol _____ Exchange Name _____ Number of Transferred Shares _____

TAX RECEIPTS

Receive your tax receipt via email. If you have selected email, please ensure it is provided in section 1. No thanks, send receipt via mail.

DONOR RECOGNITION

A donation of \$1,200 or more distinguishes you as a United Way Leader in publications

May we recognize your donation?

YES

NO, I wish to remain anonymous

If yes, please print name(s)

as you would like it to appear _____

(e.g. John & Jane Doe, Doe Family, etc.)

3 MY DONATION You may select more than one option.

Programs and initiatives evaluated¹ by United Way for lasting impact.

GENERAL FUND

Please direct my donation to where it is needed most in the community.

Overcoming Poverty

Overcoming poverty leads to more opportunities, and has a positive effect on overall quality of life.

Successful Kids

Kids are the future.

Strong Communities

We are a community of people. We are stronger together.

_____ %

_____ %

_____ %

_____ %

THE TOMORROW FUND

Learn more about United Way's long-term investment fund at info@unitedwaynbc.ca or call (250) 561-1040.

I have included United Way in my Will. Please contact me about how to support United Way in my Will.

I want to support a registered Canadian charity and I understand this contribution cannot be evaluated¹ by United Way.

25% of the receipted value of your gift must remain with United Way, and a \$12 processing fee is subtracted for each designation to cover the cost associated with your designation. For information on Canadian charities, visit: www.cra-arc.gc.ca.

Specify Canadian Charity _____ Amount \$ _____

Registered Charity Number² _____

Release my name to the charity:

YES NO, I wish to remain anonymous.

¹ Evaluation includes due diligence around program effectiveness, financial stability, and governance.

² In order for us to process your designation, you must provide us with a registered charity number.

SIGN AND DATE

Please authorize your donation by signing _____ Date _____