

GIFT OF SECURITIES A tax-smart way to donate to United Way Greater Toronto**

THE PROCESS IS SIMPLE

- 1. Complete the Notification of Securities Transfer (on reverse) and send it to United Way by email (securities@uwgt.org) or by fax (416-777-0962) Attention Securities
- 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.
 United Way's preferred broker: Scotia iTrade, Acct # 553-73239-1-6, DTC # 5011, CUID: SCOT, FINS # T085
- 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.
- 4. Eligibility of a tax receipt for the current year requires that securities must be in United Way's brokerage account by 5 p.m. on December 31st of that year.

THE BENEFITS ARE CLEAR

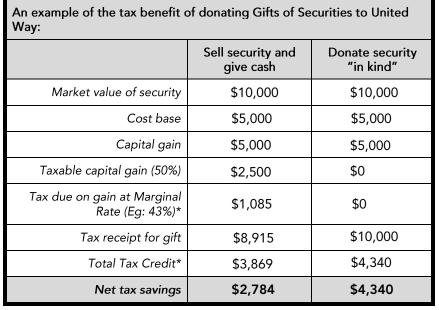
If you <u>sell</u> a security, you pay tax on 50% of the capital gain.

However, when you <u>donate</u> a gift of securities to United Way Greater Toronto 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 Greater Toronto receives the security

This multiplies the impact of the tax benefit of your charitable giving



^{*} Example uses Ontario federal and provincial combined tax rate

Have Securities with Accrued Losses?

Donate in-kind, get a receipt for FMV, and use the capital loss triggered to get a refund of capital gains tax paid in the current year or prior three years. Or carryforward the loss indefinitely!

For details on how United Way Greater Toronto handles gifts of securities, email securities@uwgt.org

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

Disclaimer: This information is general in nature and does not constitute legal or financial advice. United Way Greater Toronto recommends that before making any gift of securities of any size, a donor consults with his/her professional financial advisor(s) for the tax, financial and/or estate planning implications. Individual circumstances differ and you are strongly encouraged to discuss with your own financial counsel to ensure your gift decisions are appropriate to your situation.



GIFT OF SECURITIES Notification of Securities Transfer

**United Way Greater Toronto is the operating name of United Way of Greater Toronto

As a service to our Leadership donors (\$1,200+) United Way is pleased to offer the option to donate gifts of securities.

A minimum of \$1,200 per type of share sold must remain with United Way.

Please help us handle and acknowledge your gift appropriately by memailing-or-faxing-this-form to:
Attention: Securities, United Way Greater Toronto, securities@uwgt.org or (416)777-0962
In order to complete your donation, please contact your broker and arrange the share transfer
United Way's preferred broker: Scotia iTrade, Acct # 553-73239-1-6, DTC # 5011, CUID: SCOT, FINS # T085

GIFT DETAILS	
Number of shares	Name of security
Approximate amount of donation	Expected date of transfer
Approximate amount of donation	Expected date of transfer
Designation details	are sold must remain with United Way
Please note: A minimum of \$1,200 net per type of share sold must remain with United Way. As per United Way's Designation Services Fee Policy, a \$16 processing fee will be applied against each designation I permit United Way to share my information (name, workplace, amount) with the organization(s) listed on this form	
YOUR BROKER DETAILS	, workplace, amount) with the organization(s) listed on this form
Broker Name	Financial Institution
Phone number	 Email
DONOR DETAILS	Lilidii
DOMOR DE IVILLO	
Donor Name	
Address	
Phone number	Email
A charitable tax receipt will be issued electronically if an email address is provided above. I would prefer to receive my tax receipt via mail \square	
I agree that the donation details can also be sent to my Financial Advisor $$	
My Leadership gift (\$1,200 or more to United Way) may be publicly recognized * Yes 🗌 No 🔲	
I would like my name to appear as	
I would like my donation attributed to my workplace campaign. Yes 🔲 No 🗌	
AAC I I	
Workplace name	
Signature of donor	Date

*For the full list of United Way's recognition levels, please see https://www.unitedwaygt.org/leadership-honour-roll United Way Greater Toronto Charitable Registration Number: 119278216RR0001