



# GIFT OF SECURITIES

*A tax-smart way to give to the Foundation of Chatham-Kent Health Alliance*

## THE PROCESS IS SIMPLE

1. Complete the Notification of Securities Transfer Form (on reverse) and send it to the Foundation by email [lvince@ckha.on.ca](mailto:lvince@ckha.on.ca) or by fax 519-436-2550 Attention: Linda Vince, CPA, CGA. Linda can be reached by telephone at 519-436-2538 ext 2221.

1. Instruct your broker to transfer your securities to the Foundation of Chatham-Kent Health Alliance’s brokerage account and attach this form. Please do not transfer securities without first forwarding this form to the Foundation.

Receiving Firm: RBC Dominion Securities 519 352 1582 Office 519 352 4918 Fax  Karen Ewald, CIM Attn: Shayla Oulds 519 352 3491 Office	Account name: Foundation of Chatham Kent Health Alliance  Account number: 6372329414 BBS FINS#: T002 CUID: DOMA
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2. **A charitable tax receipt** will be issued for the closing price of the securities on the day of the transfer to the Foundation of Chatham-Kent Health Alliance.

## 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 the Foundation of CKHA 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 the Foundation of CKHA receives the security.

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

*\*Example uses Ontario federal and provincial combined tax rate*

*\*This table is for illustration purposes only. Each individual’s tax circumstances are unique and the impact on your taxes may not be exactly as shown.*

An example of the tax benefit of donating Gifts of Securities to Foundation of Chatham Kent Health Alliance:		
	Sell security and give cash	Donate security “in kind”
Market value of security	<b>\$10,000</b>	<b>\$10,000</b>
Cost base	\$5,000	\$5,000
Capital gain	\$5,000	\$5,000
Taxable capital gain (50%)	\$2,500	<b>\$0</b>
Tax due on gain at 46%*	\$1,150	<b>\$0</b>
Tax receipt for gift	\$10,000	\$10,000
Value of tax receipt at 46%*	\$4,600	\$4,600
<b>Net tax savings</b>	<b>\$3,450</b>	<b>\$4,600</b>



**Thank you for making a gift of securities to the Foundation of Chatham-Kent Health Alliance!**

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

Attention: Linda Vince, CPA, CGA Finance and Database Administrator

Email: [lvince@ckha.on.ca](mailto:lvince@ckha.on.ca) | Fax: 519-436-2550 | Telephone: 519-436-2538 ext 2221

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

Due to the cost of processing securities trades, we respectfully request a minimum Fair Market Value donation of \$500.

**GIFT DETAILS**

Number of shares

Name of security

Approximate amount of donation

Expected date of transfer

Designation details

**YOUR BROKER DETAILS**

Broker name

Financial institution

Phone number/Email address

**DONOR DETAILS**

Donor name

Address

Phone/Fax

Email

**My gift of \$500 or more may be publicly recognized by the Foundation of Chatham-Kent Health Alliance:**

Yes \_\_\_ No \_\_\_

I would like my name to appear as: \_\_\_\_\_

Signature of donor

Date

