







GIFT OF SECURITIES

Transfer Authorization Form

A tax-smart way to give to the Chatham-Kent Health Alliance Foundation (CKHAF).

THE PROCESS IS SIMPLE

- 1. Complete the Notification of Securities Transfer Form (on reverse) and send it to the Foundation by email edemers@ckha.on.ca Attention: Emily Demers. Emily can be reached by telephone at 519-352-6400 ext. 2221.
- 2. Instruct your broker to transfer your securities to Chatham-Kent Health Alliance Foundation's brokerage account with form attached. 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, Vice President & Portfolio Manager

Attn: Shayla Oulds 519-352-3491 Office

Account Name:

Chatham-Kent Health Alliance Foundation

Account number: 3844721617

DTC: 5002 CUID: DOMA

3. The value of the **charitable receipt** is determined by the closing price on the day CKHAF receives the securities into our account.

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 CKHAF, the taxable capital gain is completely eliminated AND you receive a charitable receipt as determined by the closing price on the day CKHAF receives the securities.

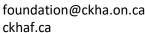
This multiplies the impact of the tax benefit of your charitable giving.

*Example uses federal and Ontario provincial combined tax rate.

*This table is for illustration purposes only. Each individual's tax circumstances are unique and the impact on your taxes.

| An example of the tax benefit of donating Gifts of Securities to CKHAF: | | |
|---|-----------------------------|---------------------------|
| | Sell security and give cash | Donate Security "in kind" |
| 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 saving | \$3,450 | \$4,600 |





















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

Please help us handle and acknowledge your gift appropriately by emailing or faxing this form to the Attention: Emily Demers, Finance Manager

Email: edemers@ckha.on.ca | Telephone: 519-352-6400 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.

| DONOR DETAILS | | | |
|--|--------------------------------------|--|--|
| | | | |
| First name | Last name | | |
| Address | | | |
| Address | | | |
| Phone | E-mail | | |
| YOUR BROKER DETAILS | | | |
| | | | |
| Broker name | Financial Institution | | |
| Phone | Email | | |
| | | | |
| Number of Security | Name of Shares | | |
| Approximate Total Value of Donation | Date of Transfer to CKHAF's Account | | |
| Type oximate rotal value of Bonation | Dute of Transfer to Civina Sylection | | |
| My gift of \$500 or more may be publicly recognized by C | KHAF 🗆 Yes 🗆 No | | |
| I would like my name to appear as: | | | |
| DONOR AUTHORIZATION | | | |
| DONOR AUTHORIZATION | | | |
| | | | |
| Donor Signature | Date | | |
| | | | |
| Donor Signature | Date | | |



519.436.2538

