



**United Way**  
London & Middlesex  
Change starts here.

# Gift of Securities Information and Transfer Form

## Make an investment in real change. Give a gift of securities to United Way.

### Investing in your community through United Way means you are investing in real change

Thank you for considering an investment in London and Middlesex County by making your donation through United Way through a gift of securities. Changes to the 2006 Federal Tax Laws eliminated tax paid on capital gains for charitable gifts of appreciated securities or publicly traded securities. Using these vehicles for your donation can provide you with an efficient means of making a significant contribution to United Way at a relatively low cost to you. A gift of publicly traded securities is the most tax-effective way to donate to charity.

Donating to United Way ensures the impact of your community investment is maximized because more money goes to where it is needed most and where it will make the most difference for all of us; improving the quality of life and potential of thousands of people within your community.

United Way identifies and understands root causes of social issues and brings together the right people and resources to find measurable, long-term solutions. Your investment ensures we continue to move towards a community where everyone matters.

### Giving a gift of securities to United Way

#### The Advantages:

- United Way will issue a charitable tax receipt for the fair market value of the gift of securities to be used for tax purposes. The fair market value will be the closing price of the securities on the date the securities are received by United Way.
- By giving the securities directly to United Way, the tax payable on your capital gain is eliminated.
- If your donation exceeds the amount eligible for a tax credit in the year your gift is made, the excess credit may be carried forward up to five years.
- If you leave securities to United Way through your Will, your estate will receive the same tax benefits. Gifts made through your Will can be claimed up to 100% of your net annual income in the year of death and the year preceding

#### Calculating the Benefits:

- The tax credit for donations is valued at approximately 45% income, for the portion in excess of the \$200 threshold.
- The marginal tax rate for each Province and individual is different – 46.6% is the highest marginal rate for Ontario.
- The example provided is for illustration purposes only. Each individual should obtain professional tax advice to understand their unique situation.
- The figures in the example have been confirmed by United Way's auditors: Deloitte, 255 Queens Ave, Suite 700, London, Ontario N6A 5R8
- A gift of securities must be a minimum of \$1,000. In accordance with United Way policy, all shares are sold immediately.

Giving to United Way	Sell Shares Donate Cash		Donate Appreciated Securities	
	Market Value of Securities	\$25,000		\$25,000
Original Cost of Securities	(\$5,000)		(\$5,000)	
<b>Capital Gain</b>	<b>\$20,000</b>		<b>\$20,000</b>	
Taxable Portion of Capital Gain	\$10,000	50%	\$0	0%
<b>Capital Gain Tax Liability</b>	<b>(\$4,600)</b>	46%	\$0	46%
Donation/Donation of Securities	\$25,000		\$25,000	
<b>Tax Credit from Donation</b>	<b>\$11,250</b>	45%	<b>\$11,250</b>	45%
<b>Net Tax Credit</b>	<b>\$6,650</b>		<b>\$11,250</b>	
<b>Benefit of Donating Securities</b>			<b>\$4,600</b>	

# Transfer your gift of securities to United Way

- 1 Contact Veronica Stoiber at United Way at 519-438-1721 or [vstoiber@uwlondon.on.ca](mailto:vstoiber@uwlondon.on.ca) **prior** to the actual transfer of shares.
- 2 Complete, sign and fax this form, in confidence, to United Way at **519-438-9938**. Once your broker has completed the transfer of shares into the United Way account, we will contact you to advise you of the value of your gift. You will receive a charitable tax receipt for that same amount.

first name	initial(s)	last name
home phone	home email	
home address	city and province	postal code
workplace (if applicable)		
work phone	work email	work fax
name of donor's brokerage firm	name of donor's broker	broker's phone
name of security/securities		
# of shares transferred	approximate value of each share	total value of donation

I understand that I will receive a tax receipt from United Way of London & Middlesex for the closing price based **on the date that the shares are received into United Way's account**. These securities have been donated to United Way of London & Middlesex without restriction and can be sold by United Way at any time considered appropriate.

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signature of donor date

A gift of \$1,000 or more distinguishes you as a United Way Leadership donor. May we recognize your generous donation in our recognition materials?  
 Yes  No  
 If yes, **please print name(s) as you would like it to appear:** .....  
 (e.g. John Doe, John & Jane Doe, the Doe Family)

Your privacy: United Way is committed to protecting your privacy. Your information will only be used to help us in the Campaign, properly administer, acknowledge and recognize gifts, process and receipt your donation and fulfill donor information requests. United Way of London & Middlesex does not sell or lease donor information. If you have any questions about our privacy policy, please call 519-438-1721 or visit [www.uwlondon.on.ca](http://www.uwlondon.on.ca).

**Receiving Firm:**  
 CIBC Wood Gundy, Attention: Mr. Larry G. Myny  
 Account name: United Way of London & Middlesex  
 Account number: 451-04115-17 BBS FINS#: CUID/DCS: WGDB

United Way of London & Middlesex  
 409 King Street, London, Ontario N6B 1S5  
 Phone: 519-438-1721 Fax: 519-438-9938  
[uw@uwlondon.on.ca](mailto:uw@uwlondon.on.ca) [www.uwlondon.on.ca](http://www.uwlondon.on.ca)  
 Charity Registration: 11926 0503 RR0001

