



United Way
British Columbia

Gift of Publicly Listed Securities to United Way British Columbia **SHARE TRANSFER FORM**

1 TO BE COMPLETED BY DONOR *Required field

Title _____ First Name of Donor* _____ Initial(s) _____ Last Name* _____
 Home Address* _____ City/Province* _____ Postal Code* _____
 Home Phone (_____) _____ – _____ Email (H) _____ Year of Birth _____
 Work Phone (_____) _____ – _____ Email (W) _____
 Donor's Workplace/ Employer (if applicable) _____

2 MY DONATION You may select more than one option.

**DIRECT my donation to where it is NEEDED MOST
in the community.**

or, I want to support the following United Way investment areas:

Children & Youth – *Setting children on their path to success*

Seniors – *Helping older adults stay independent and engaged*

Communities – *Building connections in your neighbourhood*

I want to support another registered Canadian charity and I understand this charity
is not evaluated* by United Way.

A \$16 processing fee will be deducted per donation to cover the cost associated with your designation to another charity.

For information on Canadian charities, visit: <https://www.canada.ca/en/revenue-agency/services/charities-giving/list-charities/list-charities-other-qualified-donees.html>.

Specify Canadian Charity _____

Registered Charity Number** _____

Do not release my
name to the charity.

*Evaluation includes due diligence around financial stability and governance.

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

LEGACY FUND

Please consider a Planned Gift
as part of your long-term tax,
financial, and estate planning
strategies.

I have already made
provisions in my estate
plans or Will to support
United Way.

Please contact me about
United Way gift and estate
planning opportunities.

3 OTHER DETAILS

Name of Donor's Broker _____

Broker's Firm Name _____

Name of Account and Account Number _____

Name of Security _____ # of Shares Transferred _____

Approx. Value of Each Share _____ Approx. Total Amount of Donation _____

Date of Transfer to UW Account _____

TAX RECEIPTS

Donations received by Dec 31 are issued
tax receipts by Feb 28 the following year

Receive your tax receipt via email
If you have selected email, please
ensure it is provided in section 1.

Send receipt via mail.

I understand that I will receive a charitable tax receipt for these securities from the United Way British Columbia for the closing price, on the date these securities are received in the United Way's account. These securities have been donated to United Way British Columbia without restriction and can be sold by the United Way at any time considered appropriate.

Signature of Donor: _____ Date _____

4 INSTRUCTIONS

This form is to be completed by the donor and serves as authorization and instruction to transfer specified securities to United Way British Columbia. The completed form can be sent by fax or e-mail to the donor's broker/investment advisor, UWBC at PeterK@uwbc.ca and RBC at Brian.Lundin@rbc.com. Please note our receiving firm will be unable to proceed with the sale of securities until this form is sent by you or your broker to the aforementioned parties.

Receiving Firm: RBC Dominion Securities
Name of Account: United Way British Columbia
Contact: Brian Lundin; Phone: 604-257-7333

Account #: #833-01094-1-7
Dealer/Rep code: 9190/SET
CUID: DOMA FINs: T002 DTC: 5002

Should you have any questions, please contact Manager of Planned Giving at 604-268-1343.



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 \$15,000, and the value of those shares increases to \$25,000, the capital gains are \$10,000.

If you sell those shares and donate the proceeds, you will owe tax on the \$10,000 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 advantage will be larger.

	SELL SECURITIES AND DONATE PROCEEDS TO UNITED WAY	DONATE SECURITIES DIRECTLY TO UNITED WAY
Original cost of security	\$ 15,000	\$ 15,000
Market value of security	\$ 25,000	\$ 25,000
Capital gains	\$ 10,000	\$ 10,000
A Tax due on capital gains*	\$ 2,100	\$ 0
Donation	\$ 25,000	\$ 25,000
Market value of security	\$ 50	\$ 50
Tax credit on remainder (50%)	\$ 12,400	\$ 12,400
Total tax credit from donation	\$ 12,450	\$ 12,450
Net Tax advantage	\$ 10,350	\$ 12,450

* These examples are based on an annual taxable income of \$221,708. Please consult a financial advisor to learn more.

CHECKLIST FOR YOUR CONVENIENCE

1. **Complete the transfer form on the previous page, sign and fax or e-mail to United Way at PeterK@uwbc.ca and RBC at Brian.Lundin@rbc.com.**
2. Once the signed transfer form has been received and approved by United Way, please instruct your broker to initiate the trade for transfer to UWBC. To be eligible for a current year tax receipt, the deadline to initiate a transfer is December 15.
3. The value for your tax receipt will be calculated based on the closing price of the security on the day it is received by United Way.

Should you have any questions, please contact Peter Ko at 604-268-1343.

DONOR PRIVACY – United Way British Columbia complies with the Association of Fundraising Professional's Donor Bill of Rights and is committed to protecting the privacy of your personal information. The information you provide is used to assist in the administration and acknowledgement of your gift, to issue tax receipts, and to fulfill your information questions. We do not release donor names unless requested by the donor. For more information, please visit uwbc.ca.

