



United Way
Durham Region

GIFT OF SECURITIES

Notification of Securities Transfer

Please help us handle and acknowledge your gift appropriately by **emailing or faxing this form** to:
 Attention: ksteph@unitedwaydr.com or Fax: (905) 436-6414
In order to complete your donation, please contact your broker and arrange the share transfer
 United Way's broker: [RBC Dominion Securities, Acct # 522-28014-1-6](#)

GIFT DETAILS

Number of shares	Name of security
Approximate amount of donation	Expected date of transfer

YOUR BROKER DETAILS

Broker Name	Financial Institution
Phone number	Email

DONOR DETAILS

Donor Name	
Address	
Phone number	Email
Signature of donor	Date

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
 I would like my donation attributed to my workplace campaign. Yes No

Workplace name

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Notification of Securities Transfer

THE PROCESS IS SIMPLE

1. Complete the Notification of Securities Transfer and send it to United Way by email ksteph@unitedwaydr.com or by fax 905-436-6414
2. **Instruct your broker to transfer your securities to United Way's brokerage account.**
Please do not transfer securities without first forwarding this form to the United Way.
United Way's broker: RBC Dominion Securities, Acct # 522-28014-1-6
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 sell a security, you pay tax on 50% of the capital gain.

However, when you donate a gift of securities to the United Way of Durham Region 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 United Way of Durham Region receives the security.

Thank you for making a gift of securities to the United Way of Durham Region!