



# United Way Niagara

## SHARE TRANSFER FORM FOR GIFTS OF PUBLICLY TRADED SECURITIES TO UNITED WAY

Charitable gifts of publicly listed securities are exempt from all capital gains taxation. **You can now donate publicly traded shares to United Way and you will not pay capital gains tax. Flow-through shares are also becoming a popular way to minimize your taxes while increasing your support to the community.**

*\* The three United Ways in Niagara are awaiting Provincial approval of their amalgamation. As the legal process is still ongoing, United Way Niagara is operating under the charitable registration of United Way of St. Catharines & District for income tax purposes.*

### IN ORDER TO COMPLETE THE TRADE:

1. Email this form to United Way at [kaylin@unitedwayniagara.org](mailto:kaylin@unitedwayniagara.org) or fax to 905-688-2997 **Attn: Kaylin Bailey, Manager of Major Gifts**
2. Instruct your broker to initiate trade and transfer shares to United Way's account.

The most efficient and economical way of making a gift of publicly traded securities is by electronic transfer from your brokerage firm to United Way's broker, **RBC Dominion Securities (Account Number: 5812825510).**

Receiving Institution:

**RBC Dominion Securities**

Suite #400 - 63 Church St St. Catharines, ON L2R 3C4 (905) 988-5888

Contact Person at RBC Dominion Securities:

**Debbie Warren** ([debbie.warren@rbc.com](mailto:debbie.warren@rbc.com)) or 905-988-5703

- Cuid code; DOMA
- Dtc code; 5002

3. A charitable receipt will be issued promptly at the value of the securities on the day they are vested with United Way

**TO BE COMPLETED BY THE DONOR:**

Name of Donor: \_\_\_\_\_ Daytime Tel: \_\_\_\_\_

Donor's Address: \_\_\_\_\_

Would you like to be recognized in the Honour Roll? \_\_YES \_\_NO

I would like my name to appear as:

\_\_\_\_\_

Donor's Workplace (if applicable): \_\_\_\_\_

Name of Donor's Broker:

Broker's Tel:

Donor's Brokerage Firm:

Name of Security: \_\_\_\_\_ # of Shares Transferred: \_\_\_\_\_

Approx. Value of Each Share: \$ \_\_\_\_\_ Approx. Total Amount of Donation: \$ \_\_\_\_\_

Date of Transfer to UW's Account: \_\_\_\_\_ (estimate)

***Thank you for choosing to support United Way!***

I understand that I will receive a charitable tax receipt from United Way of St. Catharines & District for the closing price based on the date that the shares are received in United Way's account. These securities have been donated to United Way without restriction, and it is United Way's policy to sell the shares at any time considered appropriate.\*

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

*\*In accordance with United Way's policy, all shares are sold immediately*

DESIGNATION PREFERENCE (IF APPLICABLE):

Through United Way you can simplify giving to all of your favourite charities through our GIFT MANAGEMENT PROGRAM. Simply make your entire securities transfer to United Way and we will administer the designation payments to the other charities you support at no additional cost/fee. This minimizes the paperwork for both you and your broker. A minimum designation of \$500 to United Way's Community Fund is required to participate.

I would like to participate in the Gift Management program. Please designate my gift as follows:

1. \$ \_\_\_\_\_ or \_\_\_\_\_% to United Way (St. Catharines & District)
2. \$ \_\_\_\_\_ or \_\_\_\_\_% to United Way (Niagara Falls & Greater Fort Erie)
3. \$ \_\_\_\_\_ or \_\_\_\_\_% to United Way (South Niagara)
4. \$ \_\_\_\_\_ or \_\_\_\_\_% to (Name of Charity): \_\_\_\_\_  
*Please notify the charity of my gift: \_\_\_yes \_\_\_no*
5. \$ \_\_\_\_\_ or \_\_\_\_\_% to (Name of Charity): \_\_\_\_\_  
*Please notify the charity of my gift: \_\_\_yes \_\_\_no*
6. \$ \_\_\_\_\_ or \_\_\_\_\_% to (Name of Charity): \_\_\_\_\_  
*Please notify the charity of my gift: \_\_\_yes \_\_\_no*
7. \$ \_\_\_\_\_ or \_\_\_\_\_% to (Name of Charity): \_\_\_\_\_  
*Please notify the charity of my gift: \_\_\_yes \_\_\_no*

Designation payments are net of any brokerage fees and proceeds received as a result of the sale of these securities.