



**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 Niagara 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.**

IN ORDER TO COMPLETE THE TRADE:

1. Email this form to United Way at 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) 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 Niagara 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 Niagara 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 Niagara'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 Niagara (St. Catharines & District)
2. \$ _____ or _____% to United Way Niagara (Niagara Falls & Greater Fort Erie)
3. \$ _____ or _____% to United Way Niagara (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.