



Make a bigger impact by donating appreciated securities and mutual funds!

A donation of securities or mutual fund shares is a win for both donor and the benefitting charity. With a donation of securities or mutual funds, capital gains tax does not apply, allowing you to give more and avoid paying capital gains taxes. It makes particular sense for high-net-worth Canadians who may have long-held, capital-gains-heavy securities in their portfolios.

	Sell and donate proceeds	Donate appreciated securities
Original Cost of Securities	\$10,000	\$10,000
Current Market Value	\$50,000	\$50,000
Capital Gain	\$40,000	\$40,000
Tax on Capital Gains	\$9,200	\$0
After Tax Donation Amount	\$40,800*	\$50,000 Charity gets \$9,200 more
Your Charitable Tax Credit	\$18,760	\$23,000 Your tax receipt is \$4,240 higher

* Assumes 46% marginal tax rate (applied to 50% of the capital gain) on securities held in non-registered portfolios.

Here's how it works.

Have your broker complete the attached letter of direction, including your signature, and forward it to the Community Foundation's broker.

The date of the donation is the date the securities are deposited in good order in the Community Foundation's brokerage account. The securities will be valued using the closing price that business day and the Foundation will provide you with a charitable tax receipt for this amount.

The shares will be sold at the earliest possible opportunity. Brokerage fees (at discounted rates) will be deducted and the net proceeds transferred to the Foundation. This amount is available to create/add to a charitable fund at the Foundation or to flow through the Foundation to another charity or charities of your choosing.

A 1% philanthropic advisory service fee is levied on flow through funds (waived for donors with established long term/endowed funds at the Community Foundation).

This information is provided for illustrative purposes only. The Community Foundation advises those contemplating the making of significant gifts to seek the advice of qualified financial advisors.

Community Foundation of Greater Peterborough
 202-261 George St. North, Peterborough, ON, K9J 3G9
 705.740.2347 www.cfgp.ca info@cfgp.ca
 Charitable Registration Number: 876232315RR0001



**Community
Foundation**
of Greater Peterborough

Community Foundation of Greater Peterborough
202-261 George St. N., Peterborough ON K9J 3G9
(705) 740-2347 www.cfgp.ca
Charitable Registration # 8762 32315 RR0001

**LETTER OF DIRECTION AND AUTHORIZATION RE TRANSFER OF PUBLICLY
TRADED SECURITIES TO COMMUNITY FOUNDATION OF GREATER PETERBOROUGH**

Name of Donor: _____

Mailing Address: _____

Home Telephone: _____

Name of Institution Transferring Stock: _____

Account Number at Delivering Institution: _____

Symbol for the Securities on the Exchange: _____

Exchange on which the Securities are Traded: _____

Number of Shares/Units: _____

PROCESS FOR MAKING A DONATION OF SECURITIES:

Please instruct your broker to call Vicki Whetung at RBC Dominion Securities at (705) 743-4511 or Carole Creighton at (705) 743-4584. **Please fax a copy of your donation request to (705) 743-4516.** Ask your broker to transfer your publicly traded securities to the Community Foundation of Greater Peterborough account 511-23189-19 CUID# DOMA DTC# 5002 with RBC Dominion Securities, Peterborough, ON and advise Jennifer DeBues, Community Foundation of Greater Peterborough, of your donation at jennifer.debues@cfgp.ca or (705) 740-2347.

The date of your donation will be the date the securities are deposited in good delivery into the Foundation's RBC Dominion Securities account. The value of the securities at the close of that business day will determine the amount of the charitable receipt issued for income tax purposes. **THANK YOU FOR THIS GIFT.**

Signature of Donor

Date

Date Received: _____

Value of Gift: \$ _____

Approved by: _____

Graham Culp, Branch Manager, RBC Dominion Securities