



kids cancer care

YOUR GUIDE TO GIFTS OF **SECURITIES & MUTUAL FUNDS**

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to Kids Cancer Care Foundation of Alberta, your estate can avoid taxes and make a significant gift at the same time.

HOW DOES IT WORK?

A charitable donation receipt is issued for the fair market value of the security at day's end on the date of transfer. You must have your broker transfer the securities to Kids Cancer Care Foundation of Alberta. *The gift will not qualify for the elimination of capital gains tax if the securities are sold and the cash then gifted to the Foundation.*

GIVING REDUCES CAPITAL GAINS TAX

	OPTION 1 <i>Sell Stock & Donate Cash</i>	OPTION 2 <i>Donate Stock Directly</i>
Value of stocks	\$10,000	\$10,000
Cost base	\$2,000	\$2,000
Capital gain	\$8,000	\$8,000
Taxable capital gain	\$4,000	\$0
Tax Credit (50% x \$10,000)	\$5,000	\$5,000
Tax on gain	\$2,000	\$0
TAX SAVING	\$3,000	\$5,000

NOTE: *This is an example only, using round numbers. Every case is unique. Please consult your advisors for specific advice. Please also note that the maximum allowable charitable tax credit is capped at 75% of income. Unused tax credits can be carried forward 5 years.*

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BENEFITS TO YOU

- **Opportunity** – An opportunity to make a significant gift.
- **Tax Advantages** – You eliminate the tax on capital gains.
- **Simple & Convenient** – Securities are easy to transfer. We will provide the forms and instructions so that your broker can transfer the shares electronically from your brokerage account to that of Kids Cancer Care Foundation of Alberta.
- **Recognition** – Your gift can be honored during your lifetime, should you wish.
- **Control** – You retain the use of the investment during your lifetime.
- **Flexible** – The designation is revocable and can be changed if your financial circumstances alter.



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YOUR GUIDE TO GIFTS OF **SECURITIES & MUTUAL FUNDS** Continued

BENEFITS TO YOU

- **Cost Effective** – There are no extra out-of-pocket costs.
- **Peace of Mind** – You can arrange your gift and know it will occur just as planned.
- **Memorialize** – Your bequest can create a lasting memorial for you, your family or anyone you may wish to honor.

MAKING A GIFT OF SECURITIES

Once you have decided to make a gift to Kids Cancer Care Foundation of Alberta and have determined which securities are to be transferred, including the number of shares, the name of the corporation(s), and the proposed date of transfer, your broker should notify us by email.

Please contact us so that we can send you Kids Cancer Care's Gift of Publicly Traded Securities confirmation form to initiate the donation.

For further information, please call Genine Neufeld, Director of Philanthropy at 403-930-6951 or contact her via email at gneufeld@kidscancercare.ab.ca.

GIFT OF PUBLICLY TRADED SECURITIES

Thank you for supporting the Kids Cancer Care Foundation of Alberta with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple, and may result in significant tax savings for you.

Donor Information

Name(s): _____

Address: _____

City: _____ Prov: _____ Postal Code: _____

Phone: _____ Email: _____

Donor's Broker Information

Company Name: _____

Broker Name: _____

City: _____ Prov: _____ Postal Code: _____

Phone: _____ Fax: _____

Email: _____

Securities to be Transferred

_____ shares of _____
of shares name of security

_____ shares of _____
of shares name of security

Transfer Securities in Kind to:

Kids Cancer Care Foundation of Alberta, Investment Account #701-61027-12
RBC Dominion Securities Inc.

Dealer Code 9190 FINS #T002 CUID DOMA
DTC 5002 EUROCLEAR #90065 Representative Code RDL

I authorize this transfer as a charitable donation to the Kids Cancer Care Foundation of Alberta. I agree that Kids Cancer Care, or its agent, may contact my broker for the purpose of concluding this transaction.

Signature of Donor(s)/Client(s)

Date

Your Charitable Tax Receipt

- A charitable tax receipt will be issued for the value of the shares transferred as determined at the end of the trading day on the day the shares are received by the Foundation's custodian, RBC Dominion Securities Inc.
- To receive a charitable tax receipt for the current tax year, the shares must be received in the Foundation's account at RBC Dominion Securities Inc. on or by December 31.

1. Complete this form. This information is needed for the transfer, tracking and receipting of your donation.

2. Give the form to your broker. Your broker will arrange for the transfer of shares to Kids Cancer Care's investment account. **Kids Cancer Care cannot initiate the transfer.** If you do not have a broker, fax this form directly to your investment firm.

3. Send a copy of the form to our broker (or ask your broker to do this):

RBC Dominion Securities
Darren White
Phone: 403-299-6508
Email: darren.white@rbc.com

4. Send a copy of the form to Kids Cancer Care (or ask your broker to do this), so we may ensure a charitable tax receipt is issued for your gift.

Please allow three business days for transfers to be completed. For more information, contact:

Genine Neufeld
Director of Philanthropy
Email: gneufeld@kidscancercare.ab.ca
Phone: 403-930-6951

KCC Charitable Registration Number
899409171RR0001