



## GIFT OF SECURITIES DONATION FORM

### Step 1: Donor Information

Donor Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone Number (cell) \_\_\_\_\_ Phone Number (alternate) \_\_\_\_\_

Email \_\_\_\_\_

I prefer to receive my tax receipt by:  Email  Printed Copy by Mail

### Step 2: Broker Information

Name of Firm or Institution \_\_\_\_\_

Client Account Number \_\_\_\_\_

Broker's Name \_\_\_\_\_

Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Email Address \_\_\_\_\_

### Step 3: Securities To Be Transferred

Security Name \_\_\_\_\_ Quantity \_\_\_\_ CUSIP \_\_\_\_\_

Security Name \_\_\_\_\_ Quantity \_\_\_\_ CUSIP \_\_\_\_\_

I authorize this transfer of securities as a charitable donation to A Dollar A Day Foundation. To qualify for capital gains tax exemption, securities must be transferred in-kind. Tax receipts are issued based on the closing price on the date the securities are received in A Dollar A Day Foundation's RBC Direct Investing account.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ (Day/Month/Year)



## Step 4: Instruct Your Broker to Transfer Your Securities To

**Receiving Institution:** RBC Direct Investing

**FINS#:** T002 CUID DOMA DTC 5002

**Account Name:** A Dollar A Day Foundation

**Account #:** 66871534

## Step 5: Send a Copy to A Dollar A Day Foundation

Please send a copy of the completed form to A Dollar A Day Foundation. We appreciate every gift, and it is important that we have your contact details for timely tracking and receipt of your donation.

A Dollar A Day Foundation

**Email:** [info@adollaraday.ca](mailto:info@adollaraday.ca)

**Mail:** P.O. Box 5751, Stn. C, St. John's, NL, A1C 5X3 Canada

### Contact Us

Contact our team directly if you have any questions or would like to discuss your gift prior to submitting this form.

**Email:** [info@adollaraday.ca](mailto:info@adollaraday.ca)

**Phone:** 709-765-1551

When you donate securities instead of selling them, you avoid paying capital gains tax. You'll also receive a tax receipt for the full market value based on the closing price on the day A Dollar A Day Foundation receives the gift.

### An example of the tax benefit of donating gifts of Securities to A Dollar A Day:

	Sell Securities for Cash. Donation after-tax proceeds	Donate Securities Directly to A Dollar A Day Foundation
<b>Original Coast of Securities</b>	<b>\$1,000</b>	<b>\$1,000</b>
<b>Current Market Value</b>	<b>\$5,000</b>	<b>\$5,000</b>
<b>Capital Gain</b>	<b>\$4,000</b>	<b>\$4,000</b>
<b>Tax on Capital Gains</b>	<b>\$920</b>	<b>\$0.00</b>
<b>Donation Amount After-Tax</b>	<b>\$4,080</b>	<b>\$5,000</b>
<b>Your Charitable Tax Credit</b>	<b>\$1,876</b>	<b>\$2,300</b>

Disclaimer: This information is general and does not constitute legal or financial advice. Please consult your financial advisor to understand the tax and planning implications of your gift.