

# Canadian Cancer Society Gifts of Securities Transfer Form

## Donation of Publicly Traded Securities

Donating a gift of securities is a tax-efficient way to support the Canadian Cancer Society. Canadians who donate appreciated securities (including stocks, bonds and mutual funds) directly to a registered charity eliminate capital gains tax on the investment. The capital gains tax exemption does not apply if you sell the securities first and then donate the cash proceeds. To illustrate the added value of transferring a gift of securities, we've included the example below.

| EXAMPLE   | Sell Stock and Donate Proceeds | Donate Stock to the Canadian Cancer Society |
|---|--------------------------------|---|
| Fair Market Value (FMV)   | \$10,000                       | \$10,000                                    |
| Initial cost of Stock   | \$2,000                        | \$2,000                                     |
| Capital Gain (FMV less cost)  | \$8,000                        | \$8,000                                     |
| Taxable Gain  | \$4,000 (50%)                  | \$0   |
| Tax Payable on Gain (43.7%)   | \$1,748                        | \$0   |
| Charitable Gift Receipt   | \$10,000                       | \$10,000                                    |
| Tax Credit (43.7%)  | \$4,370                        | \$4,370                                     |
| <b>Net Tax Benefit from Donation<br/>(tax credit minus tax payable on gain)</b> | <b>\$2,622</b>                 | <b>\$4,370</b>                              |

## Instructions for donating a gift of securities:

1. Complete the Transfer of Securities Form (page 2 of this document) with your broker and send it to **both** RBC Dominion Securities and the Canadian Cancer Society by email:

**RBC Dominion Securities Inc.**

Attn: Eddie Keung

Email: eddie.keung@rbc.com

Tel: 416-974-2484 Fax: 416-974-0332

**Dealer #: 9190 DTC#: 5002**

**CUID: DOMA**

**Canadian Cancer Society**

Attn: Kendal Clark

Email: kendal.clark@cancer.ca

55 St Clair Avenue West, Suite 300

Toronto, Ontario M4V 2Y7

2. Instruct your broker/delivering custodian to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization. You may also wish to follow up with your broker to help ensure your instructions are carried out as specified.
3. Upon receipt of the transferred securities to the CCS brokerage account, we will issue a charitable tax receipt based on the closing market value of the shares on the date they are received into our brokerage account.

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Canadian  
Cancer  
Society

CANCER.CA

# Transfer of Securities Form

In order to make your gift, please complete this form with your broker. If you do not have a broker, complete the form and send it directly to your delivering institution.

## DONOR INFORMATION

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, Province & Postal Code: \_\_\_\_\_

Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

## BROKER/DELIVERING CUSTODIAN INFORMATION (Broker/DC to complete):

Name of Broker: \_\_\_\_\_

Phone #: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

FINS# \_\_\_\_\_

Broker Fax#: \_\_\_\_\_

Broker Email: \_\_\_\_\_

Client Account #: \_\_\_\_\_

I hereby authorize the transfer in kind of the following securities to RBC Dominion Securities Inc. (FINS# T002) for credited to account #421-42114-11 in the name of the Canadian Cancer Society.

Description of Securities: \_\_\_\_\_

Name of Security: \_\_\_\_\_

CUSIP/ISIN: \_\_\_\_\_

Number of shares/units to transfer: \_\_\_\_\_

Estimated Market Value of Securities: \_\_\_\_\_

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

I would like to my gift to be used for: \_\_\_\_\_

\_\_\_\_\_

Please have a CCS staff member contact me to discuss the allocation of my gift.

We collect your personal information through forms, by phone or in person to process your donation, issue a tax receipt, and contact you to provide updates about our impact and other ways to support us or give. We may share your personal information with third parties including payment processors, consultants and agency partners within or outside your province or territory or outside Canada to carry out the purposes identified above, or as required by law. We may contact you by mail, email, phone or text. You can exercise your right to access your information or have it corrected, unsubscribe from communications or withdraw your consent by calling 1-888-939-3333 or emailing [connect@cancer.ca](mailto:connect@cancer.ca). For more information about our privacy practices, visit [cancer.ca/privacy](http://cancer.ca/privacy).

**Thank you for your support of the Canadian Cancer Society**

Charitable Registration Number: 118829803 RR0001

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