

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
Net Tax Benefit from Donation (tax credit minus tax payable on gain)	\$2,622	\$4,370

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: Judy Zhu

Email: judy.zhu@cancer.ca

Tel: 604-215-5206 or 1-800-663-2524 ext. 5206

860 – 625 Howe Street

Vancouver, BC V6C 2T6

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.

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: _____

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.

Thank you for your support of the Canadian Cancer Society

Charitable Registration Number: 118829803 RR0001

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