

St. Mary's General Hospital Foundation Gift of Securities Transfer Form

Donation of Publicly Traded Securities

Donating a gift of securities is a tax-efficient way to support the St. Mary's General Hospital Foundation (SMGHF). 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 St. Mary's General Hospital Foundation
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 The RaeLipskie Partnership, Private Wealth Management and the St. Mary's General Hospital Foundation by mail or email:

The RaeLipskie Partnership, Private Wealth Management

Attn: Jennifer Keith

Email: Jennifer@RaeLipskie.com

Tel: 1-888-578-7542 ext. 236 Fax: 519-578-7269

Dealer #: T080 DTC#: 5008

CUID: NBCS

St. Mary's General Hospital Foundation

Attn: Admin Team

Email: finance@supportstmarys.ca

Tel: 519-749-6797 Fax: 519-479-6945

911 Queen's Blvd

Kitchener, Ontario, N2M 1B2

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 SMGHF 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 authorize the transfer in kind of the following securities to **NBIN Inc. (FINS# T080)** for credited to **Account: 6C8H5LA DTC: 5008 CUID Code: NBCS Name: St. Mary's General Hospital Foundation Kitchener-Waterloo.**

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 St. Mary's staff member contact me to discuss the allocation of my gift.

Thank you for your support of St. Mary's General Hospital Foundation

Charitable Registration Number: 119189017RR0001



supportstmarys.ca

519.749.6797