



Gift of Securities

Gifts of securities are the most tax-effective way to make a donation, while helping friends and neighbours in need.

Through the donation of shares to United Way, you are able to limit the tax paid on capital gains, and receive a charitable tax receipt for the market value of your publicly traded shares.

	Sell securities and donate the after-tax proceeds	Donate securities through United Way
Original cost of your securities	\$1,000.00	\$1,000.00
Current fair market value of your securities	\$5,000.00	\$5,000.00
Capital gain/charitable tax credit	\$2,500.00	\$2,500.00
Tax on capital gain (46%)	\$920.00	\$0.00
Donation amount after-tax	\$4,080.00	\$5,000.00

*Minimum donation amount is \$1,200, which enrolls you in the Leaders of the Way giving level.

*Marginal tax rates vary according to income level.

*You may still designate to a charity, and must permit United Way to share your information with the charity.

Giving a gift of securities is easy:

1. You or your broker will complete the Share Transfer Form located on our website at <http://unitedwaykfla.ca/ways-to-give/>
2. Send the form to United Way's brokerage firm, which is listed on the Share Transfer Form.
3. Authorize your broker to transfer the securities to United Way's broker account. Your shares will be sold immediately by United Way.
4. A tax receipt and acknowledgement letter will be issued for the market value on the date of transfer. A United Way representative may also call you to verify information.

Please speak with your financial advisors about the tax benefits of donating shares.



Changing Lives Locally

United Way helps over 75,000 friends and neighbours access crucial programs locally. Here are just a few examples of how your support changes lives every day, and into the future:

17,500

children and youth participated in programs and were ready to learn

3,000

children accessed safe, fun-filled afterschool activities

4,100

people were helped with mental health challenges

540

women and children received help to leave abusive situations

11,500

people accessed affordable nutritious food

760

people accessed resources to maintain stable housing

Create Greater Impact

The power to **give more...**for less

"We choose to donate publicly traded shares to the United Way based on the fact that it eliminates any capital gains taxes that we would normally incur. With the elimination of capital gains taxes we are motivated to make a larger donation. The process is very easy so we would encourage you to talk to your financial advisor about this strategy."

- Peter & Sheila Kingston

To donate, contact United Way of KFL&A



United Way
Kingston, Frontenac,
Lennox and Addington

For more information of how you can help, visit

www.unitedwaykfla.ca