



**Canadian  
Cancer  
Society**

**BRITISH COLUMBIA AND YUKON**

565 West 10th Avenue, Vancouver, BC V5Z 4J4

Telephone 604 872 4400 Fax 604 879 4533

www.cancer.ca

BOARD CHAIR Leonard Schein

CHIEF EXECUTIVE OFFICER Barbara Kaminsky

## **Gift of Securities**

The Canadian Cancer Society, BC & Yukon Division is sincerely grateful for your gift of securities.

The procedure for giving securities is straightforward. Following your donation, we will issue a charitable tax receipt based on the closing value of the shares on the date they are received into our brokerage account.

Please note that under current tax rules the securities you donate will be exempt from capital gains tax only if you transfer them in kind. The capital gains tax exemption does not apply if you first sell the securities and then donate the cash proceeds.

### **The Donation Process**

1. Please contact our Personal Giving staff to advise of your intention to make a gift. Please let us know the type of security to be donated, the number of shares, and when you intend to make your gift.

(Mrs.) Toni Andreola, Manager, Personal Giving  
Canadian Cancer Society, BC & Yukon Division  
Direct Tel: 604-675-7112  
Toll-Free: 1-800-663-2524 (Ext 293)  
Fax: 604-675-7336  
Email: tandreola@bc.cancer.ca

Tim Staunton, Personal Giving Officer  
Canadian Cancer Society, BC & Yukon Division  
Direct Tel: 604-675-7111  
Toll-Free: 1-800-663-2524 (Ext 299)  
Fax: 604-675-7336  
Email: tstaunton@bc.cancer.ca

2. Please complete the second page of this form and fax, email or mail it to Toni or Tim. Please note that the form is for our records and does not initiate transfer of your securities.
3. Instruct your broker to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization.



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**To Be Completed By Donor:**

Name: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

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

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

Name of Security to be Transferred: \_\_\_\_\_

Number of Shares/Units of Security to be Transferred: \_\_\_\_\_

Approximate Value Per Share/Unit: \$ \_\_\_\_\_

Approximate Total Value of Gift: \$ \_\_\_\_\_

Date Shares to be Transferred: \_\_\_\_\_

Name of Donor's Broker: \_\_\_\_\_

Broker's Firm: \_\_\_\_\_

Telephone Number of Donor's Broker: \_\_\_\_\_

I understand that I will be issued a tax receipt for the closing value of the shares/units on the date they are received into the brokerage account of the Canadian Cancer Society, BC & Yukon Division.

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

**Canadian Cancer Society, BC & Yukon - Brokerage Account Information**

**Broker: Alex Prodanovic, 604-661-1506  
ScotiaMcLeod  
650 West Georgia, 11th Floor, Vancouver, BC, V6B 4N9**

**Canadian Cancer Society Account #: 439-41995-19  
DTC#: 5011, Fins#: T085**

**Charitable Registration #: 118829803 RR0002 (Canada); 98-6001242 (USA)**



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### **EXAMPLE**

Mrs. Smith is considering a \$10,000 donation to the Canadian Cancer Society, BC & Yukon Division and has sufficient net income to claim the full amount of the donation in the current year. She owns publicly listed corporation shares worth \$10,000. Mrs. Smith is in the 43.7% income tax bracket, and this year she has made other charitable donations exceeding \$200.

	<b>Sell Stock &amp; Donate Cash Proceeds</b>	<b>Donate Stock to CCS</b>
Fair Market Value of Stock (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 (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)	<b>\$2,622 (Tax Savings)</b>	<b>\$4,370 (Tax Savings)</b>

Mrs. Smith will eliminate her capital gains tax by donating the securities directly to the Canadian Cancer Society instead of selling the securities and donating the proceeds. **The remaining tax credit from her donation will reduce her other tax payable by \$4,370.** This tax credit can be carried forward for up to five years.

Income tax and tax savings are approximate. We recommend you discuss your gift intentions with your financial, legal or tax advisor.