

GIFTS OF STOCKS OR MUTUAL FUNDS: A Great Way to Give to the Causes You Care About

Did you know? Donating publicly traded stocks or mutual funds to a Canadian charity, like **The Dementia Society of Ottawa and Renfrew County**, can be one of the most strategic ways to give.

When you donate shares directly, you **don't pay any tax on the profits** you've made (*capital gains*). Plus, you get a **charitable tax receipt for the full market value** of the shares on the day they're transferred. To qualify for these benefits, your shares must be transferred "in-kind", meaning directly from your account to the charity's account, without selling them first.

By donating shares directly, you can get a larger tax credit and give more to the charity you care about.

*We recommend speaking with your financial advisor or tax advisor to make sure this type of donation is right for you.

Here's How it Works:

Let's say you want to donate \$5,000 worth of public company shares. Here's how it compares if you sell them and donate the cash vs. donating the shares directly:

Key steps	A Sell shares & donate cash	B Donate shares directly
1. Current share value	\$ 5,000	\$5,000
Original cost of shares	\$ 1,000	\$1,000
Capital gain	\$ 4,000	\$4,000
2. Tax on capital gain (approx. 27%)	\$ 1,071	\$0
Donation amount after tax (1 minus 2)	\$ 3,929	\$5,000
Your charitable tax credit	\$1,823	\$2,320

*This table is for illustrative purposes. Amounts will vary based on each person's unique tax situation and the value of shares donated.

*DSORC does not accept shares of privately held companies.

I'd Like to Donate Stocks or Mutual Funds — What Do I Do Next?

1. Ask your broker or financial advisor to help you complete our Securities Transfer Form (reverse).
2. Your broker will send the form to The Dementia Society's broker (details are on the form).
3. That's it! Once the transfer is complete, we'll send you a tax receipt for the value of the shares on the day they arrive in our account.

Thank you. Every gift helps to ensure that no one in our community faces dementia alone.

Securities Transfer Form

Thank you for your generous gift. You help ensure we continue to provide compassionate support, tailored coaching, and practical education for everyone impacted by dementia.

To make a gift of securities to the Dementia Society of Ottawa and Renfrew County, please:

- 1) Complete this form and provide it to your broker.
- 2) Send a copy of this form to **Sameer Shabbir** at sshabbir@dsorc.org.

Donor Information

Name: _____

Organization/Company: _____

Address: _____

Email # _____ Telephone # _____

☐ Please issue charitable tax receipt to **individual** indicated above.

☐ Please issue charitable tax receipt to **company** indicated above.

Donor's Broker Information

Broker Name/Institution: _____

Attention: _____ Telephone # _____

FINS # _____ Client Account # _____

Securities Transfer Information

Full Name: _____

Number of Shares: _____ Market Symbol: _____

I, _____, hereby irrevocably authorize the transfer

of shares from my account to Account # **H0D-YTFO-E** in the name of "The Dementia Society of Ottawa and Renfrew County." Charitable Registration # 118785013 RR 0001

Donor Signature: _____ Date: _____

Receiving Institution Information

Richardson Wealth • 343 Preston Street, Suite 300 • Ottawa, ON K1S 1N4 • CUID: FIDC & DTC: 5040

Attention: Sasha Peloso • 613-788-8035 • Sasha.Peloso@RichardsonWealth.com

Important Information About Your Income Tax Receipt

The value of your tax receipt is based on the closing price on the day the securities are received by The Dementia Society of Ottawa and Renfrew County. Charitable Registration # 118785013 RR 0001