

Gift of Securities

Instructions for Donor

This form should be **completed by the donor** and **submitted to the donor's broker and via email to donate@jack.org** to inform the charity of your intention to make a gift of securities.

Donor Information								
First Name	Last Na		me		Phone Number			
Street Address		Ci	ity		Province	Postal Code		
Email								
Donor Account # Num		Number o	ber of Shares Name of Se		curity			
Date Printed Name of Donor		Signature of Donor						
Donor's Brokerage Firm In	formation							
Donor Brokerage Firm Name			Broker's Phone Number and Extension					
Printed Name of Donor's Broker			Email of Donor's Broker					
Street Address		Ci	ity		Province	Postal Code		
Instructions for	Donor's Bro	ker						
Account number: 6150484613 Please fax this completed form to:								
Recipient Broker: Brendan Ashcroft, FCSI, CFP, FMA Investment Advisor BMO Nesbitt Burns 22 St. Clair Avenue E, Suite 1203 Toronto, ON, M4T 2S7 Tel: (416) 928-3352 Brendan.Ashcroft@nbpcd.com		4	Brendan Ashcroft, FCSI, CFP, FMA Investment Advisor I BMO Nesbitt Burns Fax: (416)-928-1417					
ATON Transfer Department: BMO Nesbitt Burns ATON – E Attention: Account Transfers I 250 Yonge St. 7th FI. Toronto, ON, M5B 2M8 Fax:	BMO Nesbitt Burns Dept.							
 Date	Printed Name of Broker			 Signatu	re of Broker			



Advantages of Gifts of Securities

Not only will you be supporting a network of inspiring young leaders, gifting your securities also means reducing your capital gains by 100%. When you sell publicly listed securities, you must pay capital gains tax on 50% of the increase in value since you bought them. But if you donate these same securities, you don't pay capital gains tax.

When you gift your securities, you receive a tax receipt for their full market value. This tax receipt can be applied to a maximum of 75% of your other taxable income. Donations in excess of the annual limit may be carried forward and used in any of the five subsequent years.

Things to consider when making a Gift of Securities

Highly appreciated securities provide the means to make a low-cost significant gift. Before you donate securities to Jack. org, make sure you contact us first! We will provide you with the information you and your broker need to make giving securities easy.

Jack.org will issue you a charitable tax receipt for the fair market value of the gift to be used for tax purposes. The fair market value will be the closing price of the securities on the date the securities are delivered or transferred to Jack.org's representative (contact info below).

An Illustration: Gifting Publicly Traded Securities

Giving to Jack.org	Sell Shares Donate Cash		Donate Appreciated	Donate Appreciated Securities	
Market Value of Securities	\$25,000		\$25,0	\$25,000	
Original Cost of Securities	-\$5,000		-\$5,0	-\$5,000	
Capital Gain	\$20,000		\$20,000		
Taxable Portion of Capital Gain	\$10,000	50%	\$0	0%	
Capital Gain Tax Liability	-\$4,600	46%	\$0	46%	
Donation/Donation of Securities	\$25,0	\$25,000		\$25,000	
Tax Credit from Donation	\$11,250	45%	\$11,250	45%	
Net Tax Credit	\$6,6	\$6,650		\$11,250	
Benefit of Donating Securities			\$4,6	00	