

# Gift of Securities



**A gift of securities is a thoughtful and easy way to show your support to IDRF's mission in saving lives and rebuilding communities.**

By making a gift today, you are part of a nationwide community that cares about providing effective humanitarian aid and sustainable development programs to 25+ countries around the world.

Securities can include stocks, mutual funds, and employee stock options. Donating appreciated stocks means you pay no tax on the capital gains and receive a tax receipt for the fair market value of the securities.

This efficient alternative to cash provides a substantial tax incentive and gives you the satisfaction of seeing your gift put to use today.

## Gift of Securities donation in just 3 easy steps

**1** Talk to your financial advisor to determine which investments will make the most philanthropic impact and sense for you.

**2** Complete the transfer form and instruct your broker to transfer your securities directly to IDRF and notify our Director of Impact at [zosman@idrf.ca](mailto:zosman@idrf.ca).

**3** Receive a charitable tax receipt by email once we have received the transferred securities that will be based on the closing market value of the shares on that day.

Proceeds	Sell Stock then Donate	Donate securities to IDRF
Fair Market Value	\$10,000	\$10,000
Initial cost of Stock	\$2000	\$2000
Captain Gain (FMV less cost)	\$8000	\$8000
Taxable Gain	\$4000 (50%)	\$0
Tax Payable on Gain (43.7%)	\$1,748	\$0
Charitable Gift Receipt	\$10,000	\$10,000
Tax Credit (43.7%)	\$4370	\$4370
Net Tax Benefit from Donation (tax credit minus tax payable gain)	\$2622	\$4370

# Gift of Securities Transfer form



## Donor information

Name

Address

City

Province

Postal Code

Phone Number

Email

## Donor's Broker Information

Company's Name

Broker's Name

City

Province

Postal Code

Phone Number

Email

Fax

## Securities to be Transferred

# of shares

shares of

Name of Security

# of shares

shares of

Name of Security

## Transfer Securities In Kind to

**International Development and Relief  
Foundation, Investment Account**

**#683-51095-1-0 RBC Direct Investing Inc.**  
**Dealer Code : 9190 CUID : DOMA**

The value of the donation receipt is based on the closing price of the shares on the day the shares are received by the Charity's custodian, RBC Direct Investing.

### Exception - Transfer from an Estate:

Please contact the **IDRF (416 497 0818 EXT 500)** for information regarding the valuation of securities.

## Donor Authorization

I authorise this transfer as a charitable donation to the International Development and Relief Foundation. I agree that the International Development and Relief Foundation, or its agent, may contact my broker for the purpose of concluding this transaction.

Signature of Donor/Client

Date

Additional Comments or Instructions