

Giving a Gift of Securities to United Way

It's never been a better time to make a difference in the Windsor-Essex County community by contributing to United Way through a Gift of Securities. Not only will you receive a tax receipt for the full appreciated value of a donation without incurring any capital gains tax, but you will truly have an impact on the social issues you care about most.

Advantages of a Gift of Securities

- It is the most tax-effective way to donate with the capital gains tax rate now at zero percent. While tax incentives are not the only reason to give, they are an important factor to consider.
- A Gift of Securities maximizes the impact of your contribution because more money goes where it's needed most in the community.

Why give a Gift of Securities to United Way?

The need has never been greater for our community and United Way has the expertise and experience to ensure your gift will have the greatest impact. If you have special requirements or would like to discuss a unique gift to support our city and county's vulnerable individuals and families, please contact us.

Transfer a Gift of Securities to United Way in 3 Easy Steps

1. Contact our Director of Finance & Administration at: (519) 258-0000 ext. 1144
2. Fill out the Share Transfer Form and fax to: (519) 258-2346, Attention: Director of Finance & Administration
3. Obtain the account number from United Way and instruct your broker to initiate the trade and transfer shares to United Way.*

Once we have the signed Transfer Form and the shares have been transferred to our account, a United Way representative will advise you, in writing, of the value. You will receive a charitable tax receipt for that same amount. Generally this will be based on the closing price on the day we accept the donation, but exceptions may apply.

** Any gift planning should be done in consultation with your financial or tax advisor. Restrictions may apply. Gifts will be accepted in accordance with United Way Gifts of Securities Policy.*

Contact us today and donate a Gift of Securities.

Contact Information:
Andy Bothamley, Director of Finance & Administration
Phone: (519) 258-0000 extension 1144
Fax: (519) 258-2346
E-mail: abothamley@weareunited.com

	If you sell shares & donate proceeds	If you donate shares
Purchase price	\$2,000	
Present value	\$5,000	
Capital gain	\$3,000	
Capital gain	\$3,000	0
Tax on Capital gain	\$690	0
Donation receipt	\$2,300	\$2,300
Tax benefit	\$1,610	<u>\$2,300</u>

Wow!