



Gifts of Securities

Thank you for considering a gift of securities to the Cowichan Valley Hospice Society in support of hospice care for our community.

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 Gretchen Hartley about transferring your gift. Please indicate the name and type of security to be donated, the number of shares, total value, and the date you intend to make your gift.

Gretchen Hartley, Executive Director, Cowichan Valley Hospice Society

Phone: 250-701-4242

Toll-Free: 1-888-701-4242

Fax: 250-701-4243

Email: gh.cvhs@shaw.ca

2. Please complete the Transfer of Securities Form (page 2 of this document) and send it to Gretchen Hartley by fax, email or mail.
3. Instruct your broker to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization. You may also wish to follow up closely with your broker to help ensure your instructions are carried out promptly as you prefer.

Thank You for Supporting Cowichan Hospice House!

Transfer of Securities Form (To Be Completed By Donor):

Name: _____

Daytime phone: _____

Address: _____

Email: _____

Account # of donor at delivering institution: # _____

Name and symbol of security to be transferred: _____

Number of shares/units of security to be transferred: # _____

Date for shares to be transferred: _____

Approximate value per share/unit: \$ _____

Approximate total value of gift: \$ _____

Name of donor's broker: _____

Broker's firm: _____

Telephone number of donor's broker: _____

Email of donor's broker: _____

I understand that I will be issued a receipt for tax purposes for the closing value of the shares/units on the date they are received into the brokerage account of the Cowichan Valley Hospice Society.

Donor Signature: _____ Date: _____

Cowichan Valley Hospice Society - Brokerage Account #37-MDKK-A

Broker: Ian Campbell, Industrial Alliance Securities Inc.

Phone : 250-597-2278 Fax: 250-597-2279

Email: ian.campbell@iagto.ca

FINS #: T080 • DTC #: 5008 • CUID: NBCS

Cowichan Valley Hospice Society Incorporation # S-00016319

Charitable Registration # 118878388 RR0001

****Send a copy of this form to Gretchen Hartley
Fax: 250-701-4243 - or- Email: gh.cvhs@shaw.ca**

EXAMPLE

Mrs. Smith is considering a \$10,000 donation to the Cowichan Valley Hospice Society. She owns publicly listed 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.

	Sell Stock & Donate Cash Proceeds	Donate Stock to CVHS
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)	\$2,622 (Tax Savings)	\$4,370 (Tax Savings)

Mrs. Smith will eliminate her capital gains tax by donating the securities directly to the Cowichan Valley Hospice 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.

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