

## THE PROCESS IS SIMPLE

1. Complete the Notification of Securities Transfer Form (on reverse) and send it to St. Thomas Elgin General Hospital (STEGH) Foundation by e-mail [marylou.crowley@steghfoundcation.ca](mailto:marylou.crowley@steghfoundcation.ca) or by fax 519-631-8372.
2. Instruct your broker to transfer your securities to St. Thomas Elgin General Hospital Foundation's brokerage account with the form attached. Please do not transfer securities without first forwarding this form to the Foundation.

Receiving Institution Information		
CIBC Account Transfer Dept.	Contact: Colton Homewood	
161 Bay Street, 4 <sup>th</sup> Floor	Tel: 519-631-2508, Fax: 206-631-6082	
BCE Place, P.O. Box 500	Colton.homewood@cibc.com	
Toronto, ON M5J 2S8		
RE: CIBC Wood Gundy INTST		
St. Thomas Elgin General Hospital Foundation General Fund Account #449-0225614		
Delivery Instructions: FINS# T079	DTC#5030	
CUID: WGDB EUROCLEAR: 10034	FEDWIRE: BK OF NYC/WGI	
ABA# 021000018	DEALER #9280	REP CODE: EUB LES WARES

3. The value of the **charitable receipt** is determined by the closing price on the day St. Thomas Elgin General Hospital Foundation receives the securities into our account.

## THE BENEFITS ARE CLEAR

If you sell a security you pay tax on 50% of the capital gain.

However, when you donate a gift of securities to STEGH Foundation, the taxable capital gain is completely eliminated AND you receive a charitable receipt as determined by the closing price on the day STEGH Foundation receives the securities.

This multiplies the impact of the tax benefit of your charitable giving.

An example of the tax benefit of donation Gifts of Securities to STEGH Foundation		
	Sell security and give cash	Donate Security "in kind"
Market value of security	\$10,000	\$10,000
Cost Base	\$5,000	\$5,000
Capital Gain	\$5,000	\$5,000
Taxable capital gain (50%)	\$2,500	<b>\$0</b>
Tax due on gain at 46%*	\$1,150	<b>\$0</b>
Tax receipt for gift	10,000	\$10,000
Value of tax receipt at 46%*	\$4,600	\$4,600
<b>Net Tax Saving</b>		<b>\$3,450</b>

\*Example uses federal and Ontario provincial combined tax rate.

\*This table is for illustration purposes only. Each individual's tax circumstances are unique, as is the impact on your taxes.

**Thank you for making a gift of securities to St. Thomas Elgin General Hospital Foundation!**

Please help us handle and acknowledge your gift appropriately by emailing or faxing this form to:

**ATTENTION: Mary Lou Crowley, Executive Director**

**Email: [marylou.crowley@steghfoundation.ca](mailto:marylou.crowley@steghfoundation.ca) | fax: 519-631-8372 | Telephone: 519-631-2030 ext. 2247**

In order to complete your donation, please contact your broker and arrange the share transfer. Due to the cost of processing securities trades, we respectfully request a minimum Fair Market Value of \$500.

**Donor Details**

First Name

Last Name

Address

Phone

E-mail

**Your Broker Details**

Broker Name

Financial Institution

Phone

E-mail

Number of Security

Name of Shares

Approximate Total Value of Donation

Date of Transfer to STEGH Foundation Account

My gift of \$500 or more may be publically recognized by STEGH Foundation  Yes  No

I would like my name to appear as: \_\_\_\_\_

**Donor Authorization**

Donor Signature

Date

Donor Signature

Date