

# Donating Publicly Traded Securities & Mutual Funds

By donating appreciated stocks, securities and mutual funds to BullyingCanada, you are bringing peace of mind to bullied children, and you benefit from not having to pay any capital gains tax on the investment products you are donating. You can make this kind of donation during your lifetime, or through your will.

## TAX-SMART GIVING

*You choose when you can benefit most from tax relief*

**Capital gains** are the increase in the value of your securities over the price you paid on their initial purchase. When you transfer your shares to BullyingCanada as a charitable donation, the Canada Revenue Agency does not apply capital gains tax to your donation.

You should consult a financial advisor to determine if your tax benefit from such a donation would be more beneficial during your lifetime, or in reducing estate taxes when making a gift through instructions left in your will.

## HOW IT WORKS

*A direct transfer of stocks, securities or mutual funds*

To take advantage of the elimination of capital gains tax on your donated securities, you must contact your broker or financial institution to have your securities transferred directly to BullyingCanada.

If you want to make a donation of shares you've acquired through an employee stock option plan offered by the publicly traded company you work for, you can take advantage of the elimination of your capital gains tax only if you donate the shares within 30 days of your buying them and making the gift within the same calendar year of the shares' acquisition.

Please complete the processing form that follows and mail or fax it to us to facilitate the transfer of your gift.

*You receive no capital gains benefit when selling your securities and donating the proceeds to BullyingCanada*

You will still have to pay the capital gains tax on appreciated securities, which is based on 50 percent of the increase in value from the time you bought them. If you deduct these taxes from the proceeds, your donation – and your charitable tax receipt – will both be smaller than donating the securities directly.

## WHAT KINDS OF GIFTS ARE ELIGIBLE?

### You can donate any of the following:

- Shares in publicly traded companies;
- Debt obligations or rights listed on a designated stock exchange;
- A share of the capital stock of a mutual fund corporation;
- A unit of a mutual fund trust;
- An interest in a related segregated fund trust;
- A prescribed debt obligation.

## TAX BENEFIT

The charitable tax receipt you will receive will help you immediately reduce the taxes on your taxable income. Donations in excess of your annual limit may be carried forward and used in any of the next five subsequent years. The amount receipted is based on the market value of the donated security on the date the gift is received by BullyingCanada.

## USING THE FOLLOWING FORM TO MAKE YOUR GIFT

If you wish to make a **current gift of securities** to BullyingCanada, please speak to your broker or bank, and complete and return to us the Stocks, Securities & Mutual Funds Donation Transfer Form. Or, if you plan to **make a gift of securities through your will**, please bring the Securities Donation Transfer Form to your lawyer when revising your will. Also, we would be grateful if you let us know of your future gift by sending us the attached Legacy Gift Confirmation Form, which allows us to recognize your outstanding commitment to helping bullied youth.

## JOIN OUR BRIGHTER FUTURES SOCIETY

Our Brighter Futures Society is a group of caring individuals who have told us that they have pledged to remember BullyingCanada in their estate planning. We express our great appreciation to them by listing them on our website. This public show of support demonstrates to others your leadership, vision and compassion, and encourages others to follow in your footsteps. If you plan to make a legacy gift to BullyingCanada or have done so already, please let us know by completing the Legacy Gift Confirmation Form (attached), and sending it to us.



## INDEPENDENT COUNSEL IS ADVISED

We are happy to provide you with ideas on ways you can create your memorable and meaningful legacy through your support of BullyingCanada. However, the ultimate responsibility regarding your finances, tax implications of donations, and legal local, provincial or federal regulations rests with you and your financial and/or legal counsel. We strongly encourage you to seek independent counsel when executing wills, and making gifts of cash, insurance, securities, mutual funds, registered savings and property.

### TO TRANSFER SECURITIES TO BULLYINGCANADA

1. Complete *Gift of Securities & Mutual Funds Processing Form* (next page).
2. Send a copy of the form to your Broker. **High importance**
3. Email or fax a copy of the form to BullyingCanada, Attn.: Finance Dept. **High importance**  
Email: [StockGifts@BullyingCanada.ca](mailto:StockGifts@BullyingCanada.ca) **OR** Toll-free Fax: 1-866-780-3592
4. If you do not hear from us within 48 hours, please contact us at 1-877-352-4497, ext. 8557.

### ESTIMATED TIMELINE

#### **Steps in Stocks and Securities Gift Processing - 4 business days**

1. Your broker transmits securities donation to BullyingCanada's broker at RBC Direct Investing Inc.
2. RBC Direct Investing processes and receives securities (1-3 business days).
3. Your securities are posted into BullyingCanada's RBC Direct Investment account, and a sell order is placed (1 business day). *The gift amount on your charitable tax receipt is based on the closing price on the day BullyingCanada gratefully receives your gift.*
4. BullyingCanada will send you confirmation of receipt of your gift within 2 business days of receiving your gift of securities.

#### **Timeline for Mutual Gift Processing - 10 to 25 days**

Gifts of mutual funds take significantly longer to process and complete. *The gift amount on your charitable tax receipt is based on the closing price on the day BullyingCanada gratefully receives your gift.*

### QUESTIONS?

For more information, contact Rob Benn-Frenette, Executive Director, at BullyingCanada:  
Phone: 1-877-352-4497 Ext. 8557 • Email: [StockGifts@BullyingCanada.ca](mailto:StockGifts@BullyingCanada.ca)

PROVIDE A COPY OF THIS FORM TO YOUR BROKER AND TO BULLYINGCANADA

**Donor Contact Information (required)**

FULL NAME(S) \_\_\_\_\_ COURIER ADDRESS FOR GIFT CONFIRMATION (No P.O. Box please) \_\_\_\_\_

CITY \_\_\_\_\_ PROVINCE OR TERRITORY \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

( ) - \_\_\_\_\_

PREFERRED PHONE NUMBER \_\_\_\_\_ EMAIL ADDRESS \_\_\_\_\_

**Donor's Broker Contact Information**

NAME OF FIRM \_\_\_\_\_ CONTACT NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ PROVINCE OR TERRITORY \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

PHONE NUMBER & EXTENSION \_\_\_\_\_ EMAIL ADDRESS \_\_\_\_\_

**Information about Securities/Mutual Funds to be Donated & Brokerage Account**

NAME OF SECURITIES \_\_\_\_\_ CUSIP#/SEDOL# \_\_\_\_\_

# OF UNITS DONATED \_\_\_\_\_ BROKERAGE ACCOUNT # \_\_\_\_\_ CUID#/DTC# \_\_\_\_\_

**IMPORTANT:**

This transaction will not be initiated until this form is sent to the broker of the donor who is intending to make the gift.

**To transfer securities/funds, please advise your broker of the following details:**

**RECEIVING INSTITUTION** RBC Direct Investing Inc. **ACCOUNT NAME/NUMBER** BullyingCanada / 66538900-19  
**CONTACT INFORMATION** Royal Bank Plaza, 200 Bay St., North Tower, P.O. Box 75, Toronto, Ontario, M5J 2Z5  
**Fax:** 1-888-722-2388 **Tel.:** 1-800-769-2560  
**INS#:** T002 **CUID#:** DOMA **DTC#:** 5002  
**BULLYINGCANADA'S CHARITABLE REGISTRATION NUMBER** 82991 7897 RR 0001

**INDICATE YOUR GIVING OPTIONS**

- ☐ I/we would like my/our gift to BullyingCanada to be designated where it is needed most.
- ☐ I/we wish to designate my/our gift to: \_\_\_\_\_
- ☐ I/we want to be contacted at \_\_\_\_\_ to discuss how I/we can designate this gift.  
PHONE OR EMAIL \_\_\_\_\_
- ☐ I/we wish to be recognized as a member of BullyingCanada's **Brighter Futures Society** & be listed on BullyingCanada's website.
- PREFERRED RECOGNITION NAME: \_\_\_\_\_
- ☐ I/we do not want any recognition and wish for my/our gift to be noted as "Anonymous".

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

**Please send a copy of this form to your Broker,  
and email this form to [StockGifts@BullyingCanada.ca](mailto:StockGifts@BullyingCanada.ca) or fax it to (866) 780-3592.**

☐ Yes, I/we are leaving a heartfelt legacy gift to BullyingCanada.

\_\_\_\_\_  
FULL NAME(S) & TITLES

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY

\_\_\_\_\_  
PROVINCE OR TERRITORY

\_\_\_\_\_  
POSTAL CODE

(\_\_\_\_\_)\_\_\_\_\_  
PREFERRED PHONE NUMBER

\_\_\_\_\_  
EMAIL ADDRESS

## TYPE OF GIFT

☐ Gift in will (cash) ☐ Gift in will (registered securities or mutual funds)

☐ Beneficiary of life insurance or any other insurance product

\_\_\_\_\_  
NAME OF INSURANCE COMPANY

☐ Beneficiary of RRSP or Trust

☐ I have not pledged to make a legacy gift yet, but intend to do so soon.

☐ I/we want to be contacted by ☐ Phone ☐ Email me to discuss ways to give.

## DESIGNATION OF GIFT / NAMED GIFT

☐ I/we would like my/our gift to BullyingCanada to be designated where it is needed most.

☐ I/we wish to designate my/our gift to: \_\_\_\_\_

☐ I/we want to be contacted by ☐ Phone ☐ Email me to discuss how I/we can designate this gift.

☐ I/we wish to make our gift in honour of: (NAME) \_\_\_\_\_

## BRIGHTER FUTURES SOCIETY MEMBER RECOGNITION

☐ I/we wish to be recognized as a member of BullyingCanada's  
*Brighter Futures Society* and be listed on BullyingCanada's website.



PREFERRED RECOGNITION NAME(S): \_\_\_\_\_

☐ I/we don't want any form of recognition for our gift.

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

**PLEASE NOTE THAT THIS IS NOT A BINDING LEGAL DOCUMENT.** Your signature verifies only that the above information is accurate as of this date. BullyingCanada recognizes that your circumstances may change over time. Should you update your gift plans, please ensure any provision you may make to our organization is directed to "BullyingCanada Inc., Charitable Registration Number 82991 7897 RR 0001".

## PLEASE MAIL, EMAIL OR FAX THIS FORM TO:

Rob Benn-Frenette, Executive Director, BullyingCanada  
471 Smythe Street, P.O. Box 27009, Fredericton, NB E3B 9M1  
Telephone: 877-352-4497 • Fax: 866-780-3592 • Email: Rob.Benn-Frenette@BullyingCanada.ca

**WE ARE HONOURED BY YOUR GIFT! THANKS FOR GIVING BULLIED YOUTH A BRIGHTER FUTURE.**