



Boys and Girls Club of Ottawa
Repaire jeunesse d'Ottawa

Charitable Registration # 118814565 RR0001



Gifts of Publicly Traded Securities and Mutual Funds

Did you know that the federal government has eliminated the capital gains tax on donations of publicly listed securities to registered charities? If you own stocks or mutual funds that have grown in value, you will face a tax bill when you sell them. By donating them directly to the Boys and Girls Club of Ottawa you can eliminate your tax bill and make a significant gift at the same time. This giving option is attractive if you have appreciated investments and wish to make a donation from savings rather than cash flow.

Please note the transfer deadline to receive a charitable tax receipt in 2017 is Tuesday, December 19th.

Why is a gift of publicly traded securities beneficial?

Simple and convenient – Shares are easy to transfer, your broker transfers the shares (Canadian or US) from your account directly to the Boys and Girls Club of Ottawa's brokerage account.

Tax advantages – By donating your appreciated stock shares or mutual funds directly to the Boys and Girls Club of Ottawa you will receive two kinds of tax savings: a tax credit in the form of a charitable tax receipt (based on the value of the securities as at the close of business on the day they are received by the Club) and the elimination of the capital gains owed on the disposition of the shares.

Opportunity – An opportunity to make a significant gift that provides 4,500 children and youth in seven at-risk neighbourhoods across the city with a safe space during the most vulnerable hours of the day, and FREE access to life-changing programs in four key programming pillars that are purposefully designed to drive personal development (Education, Physical Activity and Healthy Lifestyle, Leadership and Social Skills, and creative arts).

How to Proceed

1. Contact **Jennifer Baca**, Director of Advancement at 613-232-0925 extension 232 or jbaca@bgcottawa.org, and let her know of your intent to make such a donation. Please provide the following information:
 - The approximate value of the securities
 - The date you wish to make your donation
 - How you would like to designate your donation
2. **Contact your financial advisor or broker.** In most cases, you will need to provide written authorization stating your intent to transfer securities from your account to the Club's CIBC World Markets account. A sample letter of authorization is included here (with the Club's banking information) or may be available from your broker.
3. **Once the transfer is complete**, the Boys and Girls Club of Ottawa will mail your official charitable tax receipt along with our grateful thanks.

Thank You for Your Support!



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LETTER OF AUTHORIZATION TO TRANSFER SECURITIES

Date:

Broker's Name:

Broker's Company:

Address:

Telephone:

Fax:

Electronic Transfer of Securities for Charitable Purposes

Transfer From:

Company Name:

Account #

Account Name:

Donor's Name:

Donor's Address:

Security/List securities to transfer: Number of shares Company Name

Transfer to:

CIBC World Markets Inc.

BCE Place, 161 Bay St., 4th Floor

Toronto, ON M5J 2S8

Tel #: (416) 542-4302

Fax #: (416) 542-4743

FINS: T079

CUID: WGDB

DTC #: 5030

Account # 475-11706-16

Account Name: Boys and Girls Club of Ottawa

Transfer Contact: Denise Plaa, 613-783-7853

Donor's Signature

Date