



GRACE HOSPITAL  
FOUNDATION



## Gifts of Securities

Your gift to Grace Hospital Foundation directly supports patient care enhancements that would not otherwise be funded by the government, and helps assure that every patient who comes to the Grace has access to the best care possible.

By gifting listed securities intact, the capital gain is eliminated and your tax receipt is for the full fair market value of the property. Listed securities are exchange listed stocks and bonds, mutual funds, segregated funds, etc.

Normally, when you sell a stock, bond, or mutual fund that has increased in value since you purchased it, you are required to pay tax on 50% of that increased value. However, if you choose to donate the securities to charity, you pay no tax. The following example illustrates the benefit of gifting stocks to make a donation versus selling the stock and donating the cash to charity (45% tax rate):

		Sell Shares and Gift Cash to Charity	Gift Shares to Charity
Total Value of Disposition	(A)	\$10,000	\$10,000
Your Purchase Price	(B)	\$2,000	\$2,000
Capital Gains	(C) (A-B=C)	\$8,000	\$8,000
Tax on Gain	(D) (45%x(50%xC))	\$1,800	\$0
Donation	(E)	\$10,000	\$10,000
Donation Tax Credit	(F) (Ex46.4%*)	\$4,640	\$4,640
<b>Net tax savings from donation (F-D)</b>		<b>\$2,840</b>	<b>\$4,640</b>

\*46.4% is the combined federal and provincial charitable tax rate in Manitoba for gifts over \$200

Donors considering a gift of securities should speak to an advisor with appropriate expertise to implement a strategy that achieves their objectives.

If you would like to make a gift of securities, please fill out the attached form and forward it to your broker or financial institution for them to initiate the transfer. Please advise the Grace Hospital Foundation of your donation:

Leah Johnston  
Donor Relations Manager  
Phone: 204-837-0447  
Email: [ljohnston2@ggh.mb.ca](mailto:ljohnston2@ggh.mb.ca)



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## Securities Transfer Form

Please complete this form and forward it to your broker/financial institution for them to initiate the transfer.

Donor Name \_\_\_\_\_

Home Address \_\_\_\_\_ Unit/Apt. # \_\_\_\_\_

City/Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Delivering Institution Name \_\_\_\_\_

Delivering Institution Address \_\_\_\_\_

Delivering Institution Account # \_\_\_\_\_

Name of Security \_\_\_\_\_ # of Shares \_\_\_\_\_

Approximate value of each share \$ \_\_\_\_\_  
Approximate total amount of donation \$ \_\_\_\_\_

This form will serve as your authorization to release the securities noted above to the account of Grace Hospital Foundation. I understand I will receive a charitable tax receipt from Grace Hospital Foundation for the closing prices of these securities on the date of transfer to Grace Hospital Foundation's account. These securities have been donated to Grace Hospital Foundation without restriction and can be sold by Grace Hospital Foundation at any time.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

### Delivery Instructions:

FINS#: T079      DTC#: 5030      CUID: WGDB      EUROCLEAR#: 9347  
ABA#: 021000018      DEALER#: 9280      REP CODE: LQQ      ACCOUNT#: 710-02020-14  
FEDWIRE: BK OF NYC/WGI

### Receiving Institution:

CIBC Wood Gundy  
1000 – One Lombard Place  
Winnipeg, MB R3B 3N9  
Phone: 204-946-9806  
Email: Shannon.hildebrand@cibc.com