

The Advantage of Donating Gifts of Securities

A gift of appreciated securities is a worthwhile alternative to a cash gift. Flexible choices allow you to decide how you want to give, and the elimination of capital gains tax on gifts of appreciated securities provides you with a substantial tax incentive for donating stock. Other benefits include:

- A charitable tax receipt
- No capital gains tax paid
- Satisfaction of seeing your gift put to good use today
- Recognition on our Donor website and invitations to special events throughout the year

Gifts of securities are a tax-effective opportunity to transform an asset into immediate and significant support for JABC. You can help us advance financial education for youth both now and in the future.

	Sell shares and donate cash	Donate shares directly to JABC
Current value of shares	\$50,000	\$50,000
Amount paid for shares	\$10,000	\$10,000
Capital Gains (Difference between current value and amount paid)	\$40,000	\$40,000
Tax on 50% of Capital Gains*	\$10,700 (50% of gain = \$20,000 x 53.5% tax rate)	\$0
Donation amount after tax	\$39,300	\$50,000

Scenario is simplified for illustrative purposes only.

*Assumes gift made in B.C. at a marginal tax rate of 53.5%.

THREE SIMPLE STEPS

1. Determine with your financial advisor which investments will make the most philanthropic and financial impact to you.
2. Contact us to let us know you would like to make a gift and we will send you the transfer form.
3. Complete our transfer form and instruct your broker to transfer your securities directly to JABC.

For more information about gifts of securities, please contact Nancy Cardozo at: 604-688-3887 ext 229 or nancy.cardozo@jabc.org

Gift of Publicly Listed Securities to JA British Columbia

Transfer Form – to be completed by donor

Name of donor: _____

Phone number (day): _____

Mailing address Street: _____

City/province: _____

Postal code: _____

Email: _____

Contact name at donor's brokerage:

Name of brokerage firm: _____

Broker's phone number: _____

Mailing address Street: _____

City/province: _____

Postal code: _____

Broker's email: _____

Name of account: _____

Account number: _____

Description of securities: Equities/Mutual Funds/Bonds

Security: _____ Quantity: _____ US/Cdn: _____

Security: _____ Quantity: _____ US/Cdn: _____

Approximate total amount of donation: _____

Gift Designation:

Greatest Need: _____

Financial Literacy: _____

Work Readiness: _____

Entrepreneurship: _____

I understand that it is JA British Columbia's (JABC's) policy to sell publicly listed securities the same day they are received into the JABC account. I will receive a tax receipt from JABC for the value of the securities upon receipt by JABC's brokerage.

Signature of Donor: _____ **Date:** _____

May we recognize your donation on our website? Yes _____ No _____

Receiving brokerage contact information

RBC Dominion Securities

Account name: Junior Achievement of British Columbia

Account number: 8041419618

Name of JABC's broker: Brian Lundin

Phone number: 604-257-7333

Fax: 604-235-9950

Email: brian.lundin@rbc.com

CUID: DOMA DTC: 5002

FIRM: 9190 Rep code: SET

Checklist for your convenience

1. To ensure your transaction is handled efficiently, please contact Nancy Cardozo at: 604-688-3887 ext 229 or nancy.cardozo@jabc.org
2. Complete this form, sign it, and either scan to email or fax it to Brian Lundin at RBC Dominion Securities (contact information above.)
3. Instruct your broker to initiate the transfer on your behalf to JABC's brokerage account. You may wish to send them the signed copy of this form.

Thank you for your generous support

JA British Columbia

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Tel: 604-688-3887

jabc.ca

Charitable registration number: 11897-6166 RR0001