



PINE RIVER
Foundation

GIFT OF SECURITIES

HOW TO DONATE A GIFT OF SECURITIES

1. **Contact GMP Securities: Bill Wilder** at bill.wilder@richardsongmp.com at 416-941-6739. Bill will provide you with further details, including account numbers for Canadian Securities, as well as US Securities.
2. **Please fill out and return a copy of the attached Notification of Securities Transfer to Pine River Foundation.** Email Lisa Zaccaglino at lisa@pineriverfoundation.com
3. **A charitable tax receipt** will be issued for the closing price of the securities on the day of the transfer to Pine River Foundation. All securities are sold on the same day as received by Pine River Foundation.

THE BENEFITS

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

However, when you donate a gift of securities to Pine River Foundation the **taxable capital gain is completely eliminated**

AND

You receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day Pine River Foundation receives the security

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



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

* Example uses Ontario federal and provincial combined tax rate



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Notification of Securities Transfer

Please help us handle and acknowledge your gift appropriately by **emailing or faxing** to:
Lisa Zaccagliano lisa@pineriverfoundation.com or 416-955-1652
In order to complete your donation, please contact your broker and arrange the share transfer

GIFT DETAILS

Number of shares: _____ Name of security: _____
Approximate amount of donation:\$ _____ Expected date of transfer: _____
Dealer: _____ Account number: _____
CUID: _____ Contact: _____

DONOR DETAILS

Donor Name: _____
Address: _____
Phone/Fax: _____ Email: _____
My gift may be publicly recognized by Pine River Yes No
I would like my name to appear as: _____

Signature of donor

Date

PINE RIVER ACCOUNT DETAILS

Dealer: Richardson GMP **Account number:** 400-RPQO-A
CUID: GMPT **DTC:** 5016 **Contact:** Bill Wilder – 416-941-6739

Pine River Foundation Charitable Registration Number: 834506057RR0001