



## ATSIKANA PA ULENDO

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### Donations of Marketable Securities

APU Canada and our students in Malawi are sincerely grateful for your donation of marketable securities. This approach is available without charge for gifts in the amount of \$1,000 or greater.

#### TAX ADVANTAGES

Under current tax rules, the securities that you donate will be exempt from capital gains tax if you donate them “in kind”. The exemption from capital gains tax does not apply if you sell the securities and then donate the cash proceeds. Also, the tax advantages are not available if the securities are now in an RRSP.

If you have any questions about the benefits of this approach, please consult with your financial advisor.

#### DONATION FACILITATOR

Donations will be facilitated by Sooke Rotary Community Organization (SRCO). SRCO will send you a charitable donation receipt for the gross proceeds of disposition of your securities. The net proceeds will be available for transfer to APU Malawi within one working day after they are received into SCRO’s brokerage account.

If you have any questions about the SRCO or about the process, you or your advisor should contact the Treasurer of APU Canada, David Stocks, at 250-474-1548, [fdstocks@telus.net](mailto:fdstocks@telus.net).

#### DONATION PROCESS

1. In consultation with your financial advisor, decide on the amount of your gift and then choose the securities that will give you the greatest benefit.
2. Instruct your broker to complete the transfer of securities to SRCO. Depending on your broker’s policies, you might be able to use the last page of this form to convey your instructions.
3. Send your name and address, with details of your donation, to APU Canada by e-mail or postal mail so we can issue your receipt. (For postal mail, a copy of the second page of this form will be sufficient.)

***Security donations are that easy!***

***Thanks again from  
Atsikana Pa Ulendo – Malawi Girls On The Move!***

**EXAMPLE OF TAX ADVANTAGES**

The following example shows the merits of this approach for an imaginary donor – Mrs. Donor. Please consult with your financial advisor for details about the merits that you can enjoy.

Mrs. Donor wishes to donate \$10,000 to APU Canada and has sufficient net income to claim the full amount of the donation in the current tax year. She owns publicly traded securities that she purchased for \$2,000. The securities have now increased in value to \$10,000. Mrs. Donor is in the 43.7% bracket for marginal income tax. She has made other charitable donations exceeding \$200 this year.

	<b>Sell Securities and keep the proceeds</b>	<b>Sell Securities and donate the proceeds</b>	<b>Donate Securities under old tax rules</b>	<b>Donate Securities under new tax rules</b>
Market value of securities	\$10,000	\$10,000	\$10,000	\$10,000
Initial cost of securities	\$2,000	\$2,000	\$2,000	\$2,000
Capital gain	\$8,000	\$8,000	\$8,000	\$8,000
Taxable capital gain	\$4,000 (50%)	\$4,000 (50%)	\$4,000 (25%)	\$4,000 (0%)
Tax payable on gain @ 43.7%	\$1,748	\$1,748	\$874	\$0
Charitable donation receipt	N/A	\$10,000	\$10,000	\$10,000
Tax Credit @ 43.7%	N/A	\$4,370	\$4,370	\$4,370
Tax impact	\$1,748 payable	\$2,622 credit	\$3,496 credit	\$4,370 credit

**DONOR INFORMATION**

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

Mailing address: \_\_\_\_\_

Res. Phone: (\_\_\_\_) \_\_\_\_\_ Bus. Phone: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

Please add me to your mailing list for further information on the development of the project

May we mention your name as a donor in your publicity related to this project YES  NO

**PRIVACY STATEMENT**

*We collect this information only as a measure to ensure we can contact you in case we have questions about your contribution. We do not sell or share your personal information with a third party, unless the law requires us to do so.*

*We, at APU promise to use all reasonable means to protect and safeguard your personal information.*

*We thank you for your support.*

# INSTRUCTIONS TO DONOR’S BROKER

TO: \_\_\_\_\_  
(Name of Donor’s broker)

FROM: \_\_\_\_\_  
(Name of Donor)

As discussed, please transfer securities from my account to the account of Sooke Rotary Community Organization, as described below.

Target amount of donation: \$ \_\_\_\_\_

Description of securities to be donated: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Transfer Date: \_\_\_\_\_

Donor’s Signature: \_\_\_\_\_

Signature Date: \_\_\_\_\_

### Sooke Rotary Community Organization Information:

*Brokerage Office:* CIBC CIBC Wood Gundy, 10180-101 Street, Edmonton, Alberta T5J 3S4  
800-232-7296

*Brokerage Account:* 761-11532-19-LYK; FINS T079; CUID WGDB; DTC # 5030;  
EUROCLEAR # 9347; FEDWIRE: Bk of NYC/WGI;  
ABA # 021000018; Dealer # 9280 (Mutual Funds)

*Broker:* David McNaughton, 780-498-5003, david.mcnaughton@cibc.ca

*Assistant:* Deniece Von Gertzen, 780-970-5335, deniece.von.gertzen@cibc.ca