

Gift of Securities

Thank you for donating to Jack.org!

Your donation will directly support young leaders who are revolutionizing mental health in every province and territory across Canada.

Advantages of Gifts of Securities

Not only will you be supporting a network of inspiring young leaders, gifting your securities also means reducing your capital gains by 100%. When you sell publicly listed securities, you must pay capital gains tax on 50% of the increase in value since you bought them. But if you donate these same securities, you don't pay capital gains tax.

When you gift your securities, you receive a tax receipt for their full market value. This tax receipt can be applied to a maximum of 75% of your other taxable income. Donations in excess of the annual limit may be carried forward and used in any of the five subsequent years.

Things to consider when making a Gift of Securities

Highly appreciated securities provide the means to make a low-cost significant gift. Before you donate securities to Jack.org, make sure you contact us first! We will provide you with the information you and your broker need to make giving securities easy.

Jack.org will issue you a charitable tax receipt for the fair market value of the gift to be used for tax purposes. The fair market value will be the closing price of the securities on the date the securities are delivered or transferred to Jack.org's representative (contact info below).

An Illustration: Gifting Publicly Traded Securities

Giving to The Jack Project	Sell Shares Donate Cash		Donate Appreciated Securities	
Market Value of Securities	\$25,000		\$25,000	
Original Cost of Securities	-\$5,000		-\$5,000	
Capital Gain	\$20,000		\$20,000	
Taxable Portion of Capital Gain	\$10,000	50%	\$0	0%
Capital Gain Tax Liability	-\$4,600	46%	\$0	46%
Donation/Donation of Securities	\$25,000		\$25,000	
Tax Credit from Donation	\$11,250	45%	\$11,250	45%
Net Tax Credit	\$6,650		\$11,250	
Benefit of Donating Securities			\$4,600	



192 Spadina Avenue, Unit 505
Toronto, ON M5T 2C2

Charitable Registration Number
84852 1837 RR0001

Direction to Transfer Securities Electronically

This form should be completed by the donor and submitted to the donor’s broker. The donor is advised to contact Jack.org (Catelyn Brett: catelyn@jack.org) to confirm the instructions have been delivered.

To the attention of:

Donor Brokerage Firm Name		Donor Account Number	
Donor Brokerage Firm Address	City	Province	Postal Code

Instructions for donor’s broker:

STEP 1: You are hereby directed to transfer electronically the following securities representing a charitable gift from my account for deposit to **BMO Nesbitt Burns** for deposit to Jack.org - Account number 6150484613

Recipient Broker: Brendan Ashcroft, FCSI, CFP, FMA | Investment Advisor | BMO Nesbitt Burns | 22 St. Clair Avenue E, Suite 1203, Toronto, ON, M4T 2S7 | Tel: (416) 928-3352
Brendan.Ashcroft@nbpcd.com

ATON Transfer Department: BMO Nesbitt Burns ATON – BMO Nesbitt Burns, Attention: Account Transfers Dept., 250 Yonge St. 7th Fl. Toronto, ON, M5B 2M8 | Fax: (416) 644-1663

Number of shares	Name of security

STEP 2: You are further directed to acknowledge receipt and execution of this instruction by faxing a signed copy of this form to Michael P. Saunders, BA, FMA, CFP | Investment Advisor | BMO Nesbitt Burns | Fax: (416) 928-3321



192 Spadina Avenue, Unit 505
Toronto, ON M5T 2C2

Charitable Registration Number
84852 1837 RR0001

Date

Signature of Donor

Print Name

I acknowledge receipt of this direction to transfer and have faxed *a signed copy* of this form to Michael P. Saunders, BA, FMA, CFP | Investment Advisor | BMO Nesbitt Burns | Fax: (416) 928-3321

Donor Brokerage Firm Name

Signature of Donor's Broker

Broker's Phone Number and Extension

Print Name of Donor's Broker

Date