

# A GIFT OF SECURITIES

In 2006, the capital gains tax was eliminated on all gifts of publicly-traded securities made to registered charities (stocks, bonds, mutual funds, etc). This provision offers donors the opportunity to realize significant tax savings by donating securities directly to the Alzheimer Society of Nova Scotia.

The donation must be an 'in-kind' transfer of the security itself, not the cash proceeds from the sale of the security. Such a transfer is easily made electronically from your investment account to the Alzheimer Society of Nova Scotia's brokerage account.

## BENEFITS TO YOU:

- ✔ Donations of appreciated publicly-listed securities to the Alzheimer Society of Nova Scotia are exempt from capital gains tax.
- ✔ You will receive a tax receipt for the full fair market value of the security based on the closing trading price on the day it is received.
- ✔ Your charitable donation can be claimed up to 75% of your net income and any unused donation amount can be carried forward over the next five years.
- ✔ If you have appreciated stock, you may wish to use this incentive to contribute a meaningful gift to the Alzheimer Society of Nova Scotia.

## ESTABLISHING A GIFT OF SECURITIES

Please find attached the Alzheimer Society of Nova Scotia's stock and securities donation form and information that your broker will need to carry out the stock transfer. You can begin the transfer process by completing the donation form and sending it to your broker and to the Alzheimer Society of Nova Scotia.

Your broker should provide you with an estimate of how long it will take to complete the transaction. The security will be valued at the closing price on the date it is received in the Alzheimer Society of Nova Scotia brokerage account. An official receipt for income tax purposes will be issued by the Alzheimer Society of Nova Scotia and forwarded to you.

**PLEASE NOTE: The value of the donation receipt will be based on the closing price of the securities on the day they were received into the Alzheimer Society of Nova Scotia's account in accordance with Canada Revenue Agency regulations.**

# STOCK & SECURITIES DONATION FORM

## DONOR INFORMATION

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Prov: \_\_\_\_\_ Postal Code: \_\_\_\_\_

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

## DONOR'S BROKER INFORMATION

Financial Institution: \_\_\_\_\_

Name: \_\_\_\_\_

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

## SECURITIES TO BE TRANSFERRED

From account #: \_\_\_\_\_

\_\_\_\_\_ shares of \_\_\_\_\_

*# of shares* *name of security*

## TRANSFER SECURITIES IN KIND TO:

Account #511942A1

Credential Securities Inc.

DTC 5083

FINS #T088

Dealer Code 7799

CUID CRED

I authorize this transfer as a charitable donation to the Alzheimer Society of Nova Scotia. I agree that the Alzheimer Society of Nova Scotia, or its agent, may contact my broker for the purpose of concluding this transaction:

Signature of Donor: \_\_\_\_\_

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

Please publish my name on donor lists as:

Please do not publish my name on any donor list

## Your Donation Receipt

The value of the donation receipt will be based on the closing price of the securities on the day they were received into the Alzheimer Society of Nova Scotia's account in accordance with CRA regulations.

## 1. Complete this form.

This information is needed for the transfer, tracking and receipting.

## 2. Give the form to your broker.

Your broker will arrange for the transfer of shares to the Alzheimer Society of Nova Scotia investment account. The Alzheimer Society of Nova Scotia cannot initiate the transfer. If you do not have a broker, fax this form directly to your investment firm.

## 3. Send a copy of the form to our broker (or ask your broker to do this):

Transfers Team  
Aviso Wealth Inc.  
700-1111 West Georgia Street  
Vancouver, BC V6E 4T6  
1-888-545-5959  
acpsupport@aviso.ca

## 4. Send a copy of the form to the Alzheimer Society of Nova Scotia (or ask your broker to do this), so we may ensure a donation receipt is issued for your gift.

### Attention:

Audrey Milley  
Alzheimer Society of Nova Scotia  
112-2719 Gladstone Street  
Halifax NS B3K 4W6  
Email: audrey.milley@asns.ca  
Tel: 902-332-0947  
Fax: 902-422-7971

**For questions and more information, please contact Audrey Miller using the contact details above.**