

GIFT OF SECURITIES

A tax-smart way to donate to United Way of Saskatoon & Area



The Benefits are Clear.....

If you sell a security, you pay tax on 50% of the capital gain. However, if you donate a gift of securities to United Way 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 United Way receives the security. This multiplies the impact of the tax benefit of your charitable giving.

The Process is Simple.....

1. Notify United Way of Saskatoon & Area prior to the actual transfer of shares. United Way will then alert our Broker (Edward Jones) of the impending transaction. Contact Carissa at 306-975-7700 or office@unitedwaysaskatoon.ca.
2. Fax/deliver the Share Transfer Form on the reverse of this page to your Investment Advisor. Instruct your Advisor to complete the form and initiate the transfer. *Your Investment Advisor must initiate the transfer of the gift.*
3. Have your Investment Advisor fax or email a copy of the completed Share Transfer Form to Judy Bray, Edward Jones at judy.bray@edwardjones.com or fax Judy at 877-630-7715. Please also have a copy faxed or emailed to United Way of Saskatoon & Area, Attention: Carissa Behnke, Director, Finance & Operations. Email: office@unitedwaysaskatoon.ca or Fax: 306-244-0583

If you have any questions, please contact Judy Bray at Edward Jones at 306-955-4951 or judy.bray@edwardjones.com) or Carissa Behnke, Director, Finance & Operations at United Way of Saskatoon & Area at 306-975-7700 or office@unitedwaysaskatoon.ca.

Thank you for your continued support of United Way. Your generous gift helps ensure a stronger and more caring community. United Way invests in a balanced, diversified portfolio of programs and initiatives that address Saskatoon and surrounding area's most pressing issues.

Donating Securities to United Way... its fast, it's easy and both you and your community benefit.

Gift of Publicly Traded Securities – Transfer Form

To be completed by donor/financial advisor: Date: _____

Name of Donor _____ Daytime telephone _____

Donor's Address _____

Donor's Workplace (if applicable) _____

Name of Donor's Broker _____ Broker's telephone _____

Firm _____

Name of Security _____ # of Shares Transferred _____

Approx Value of Each Share \$ _____ Approx. Total Value of Donation \$ _____

Date of Transfer _____

Dear Sir or Madam,

Please accept this letter as an authorization to donate _____ (#) shares of _____ currently held in my account _____ (Donor's account #) at _____ (name of financial institution) in the name of _____ (name of Donor).

Please arrange to transfer funds directly to the United Way of Saskatoon & Area, Account #201-14598-11 at Edward Jones (CUID is EDJC).

Signature of Donor: _____ Date of Request _____

Leadership Giving

Your gift of \$1,200 or more distinguishes you as a United Way Leader. May we recognize your Leadership gift in published materials? _____ Yes _____ No
If yes, please print name(s) as you would like it to appear in print materials:

1. Send a copy of this Form to your Transfer Out Department to send to the Transfer In Department of Edward Jones.
2. Fax or email a copy of this form to Judy Bray, Edward Jones. Fax 877-630-7715; Email judy.bray@edwardjones.com; Phone 306-955-4951.
3. Fax or email a copy of this Form to United Way of Saskatoon & Area. Fax 306-244-0583; Email office@unitedwaysaskatoon.ca