

Gifts of Publicly Traded Securities and Mutual Funds

A few years ago, the federal government eliminated the capital gains tax on donations of publicly traded securities and mutual funds. If you own stocks or mutual funds that have grown in value, you will face a tax bill when you sell them. By donating them **directly** to the Alzheimer Society, you can **eliminate your tax bill** and make a significant gift at the same time. This giving option is attractive if you have appreciated investments and wish to make a donation from savings rather than cash flow.

Benefits to you

Simple and convenient – Shares are easy to transfer. Your broker transfers the shares from your account directly to the Alzheimer Society's brokerage account.

Tax advantages – By donating your appreciated stock shares or mutual funds directly to the Alzheimer Society, you will receive two kinds of tax savings: a tax credit in the form of a charitable tax receipt and the elimination of the capital gains owed on the sale of the shares.

Another tax advantage – Gifts of Publicly Traded Securities and Mutual Funds can also be given through your Will. This is an excellent way to reduce capital gains taxes upon death.

Recognition – Your gift can be honoured during your lifetime.

You can make a difference – Each one of us is unique and legacy gifts are made for personal reasons. By including the Alzheimer Society in your estate plans, you are joining with us to save the world from dementia.

How?

The donation must be made "in-kind" to qualify for the capital gains tax exemption, meaning the shares must be transferred directly into the Alzheimer Society's brokerage account. A donation receipt is issued for the fair market value of the shares on the date of transfer. Your gift will not qualify for the capital gains tax elimination if your shares are sold and the cash then gifted to a charity.

Even Super Heroes need help

We recommend that you seek professional advice to ensure your financial goals are considered, your tax situation is reviewed, and your charitable gift is tailored to your family circumstances. To learn more about how you can leave a gift, contact a member of our Foundation staff at your local Alzheimer Society office.

Brant	519-759-7692	Email: mary.burnett@alzda.ca
Haldimand Norfolk	519-428-7771 (Toll Free: 1-800-565-4614)	www.alzheimersocietyfoundation.ca
Hamilton Halton	905-529-7030 (Toll Free: 1-888-343-1017)	Charitable Registration # 894537984RR0001

Be our **Super Hero** – Do your Will and Powers of Attorney Today!