



Gifts of Publicly Traded Securities and Mutual Funds

Donating Publicly Traded Securities and Mutual Funds directly to Chalice eliminates your tax bill and makes a significant gift at the same time. You can also give them through your Will; this reduces capital gains taxes upon death, thereby significantly reducing taxes which may increase inheritances to your loved ones.

Giving securities and mutual funds might appeal to you if:

- You own stocks or mutual funds that have grown in value, and don't want a tax bill from selling them.
- You wish to donate from savings rather than cash flow.

Other benefits of giving stocks/mutual funds are:

- Eliminate the capital gains tax bill from the Canadian government that you would have to pay if you sold them.
- Receive a charitable tax receipt at the same time (the date the shares are received to our brokerage account).
- Shares are easily transferred from your broker to Chalice's account. (Many brokers waive fees for charitable transactions. Ask your broker.)

How to give securities and/or mutual funds (Two Steps)

1. Transfer your securities directly* into Chalice's brokerage account using the "Securities Donation Transfer Intent Form" on page 3, or at chalice.ca/securities-donation-transfer-intent-form.
2. We will issue a charitable tax receipt** in February of the calendar year following the year of donation (unless otherwise requested.)

*Your gift will not qualify for the capital gains tax elimination if your shares are sold and the cash then gifted to a charity. The donation must be made "in kind" to qualify for the capital gains tax exemption.

**Your tax receipt is based on the closing price of the securities on the day that they are received into our account, as per CRA regulations.

Share Certificates

You may donate an endorsed share certificate with your signature, guaranteed by the bank or your broker. Or, you can donate an unendorsed certificate and a signed stock or bond power of attorney with the signature guaranteed. Certificates may be delivered by courier to Chalice if due precaution is observed, that is, the unendorsed certificates and the stock or bond power of attorney are delivered separately.

We do not recommend re-registering the share certificates in the name of Chalice because re-registration can take more than two weeks and the value of the shares might change.



Transferring Mutual Funds

Send a letter of instruction to your fund company, and then sign the documents they issue.

A letter of instruction states:

"I request that (Name of Mutual Fund) immediately transfer (number) _____ shares from my account # _____ into the name of Chalice (Canada). Do not sell or redeem this donation from my account. After Chalice (Canada) receives confirmation that the shares are in its account, it may authorize the sale of the shares to use to further its mission."

Chalice (Canada) is pleased to provide you with a Securities Donation Transfer Intent Form. This form should accompany your letter of instruction to your financial institution.



As you consider a gift to Chalice, please consult a trusted professional to consider your financial goals, review your tax situation, and ensure your gift is right for your circumstances. Contact our Planned Giving Team: Peter, Wilson, or Catherine today.



Securities Donation Transfer Intent Form

To assist Chalice in processing your donation in a timely manner, please fill out and submit this form [online](#), or email it to us prior to transferring securities.

Donor Information - Name of Owner of Securities for charitable receiving purposes:

Name:

Address:

Email:

Home Phone:

Business Phone:

Cellular:

DOB:

Expected Date of Transfer:

You will receive verbal or email confirmation when your donation is received in our office and a Gift-in-Kind charitable tax receipt through the mail recognizing the value of your donation in February of the calendar year following the year of donation.

*Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into our account in accordance with Canada Revenue Agency (CRA) regulations.