



GRACE HOSPITAL
FOUNDATION



GIFTS OF SECURITIES

Your donation to the Grace Hospital Foundation directly contributes to staff and patient care enhancements that go beyond government funding, ensuring every person receives the highest quality care possible.

By donating listed securities directly, you eliminate the capital gains tax and receive a tax receipt for the full fair market value of the securities. Listed securities include exchange-traded stocks and bonds, mutual funds, segregated funds, and similar assets.

Typically, when you sell a stock, bond, or mutual fund that has appreciated in value, you are taxed on 50% of the capital gain. However, by donating the securities to a charity, you avoid this tax entirely. The following example highlights the financial advantage of gifting securities versus selling them and donating the proceeds (based on a 45% tax rate):

| Scenario | Sell Shares & Gift Cash | Gift Shares Directly |
|--------------------------------------|-------------------------|----------------------|
| Total Value of Securities (A) | \$10,000 | \$10,000 |
| Original Purchase Price (B) | \$2,000 | \$2,000 |
| Capital Gains (A – B = C) | \$8,000 | \$8,000 |
| Tax on Gains (45% x 50% x C) (D) | \$1,800 | \$0 |
| Donation Amount (E) | \$10,000 | \$10,000 |
| Donation Tax Credit (E x 46.4%*) (F) | \$4,640 | \$4,640 |
| Net Tax Savings (F – D) | \$2,840 | \$4,640 |

**46.4% represents the combined federal and provincial charitable tax credit rate in Manitoba for donations exceeding \$200*

If you're considering a gift of securities, consult a qualified financial advisor to develop a strategy that aligns with your goals.

To make a gift of securities, please complete the attached form and forward it to your broker or financial institution to initiate the transfer. Please advise the Grace Hospital Foundation of your donation and provide us with a copy of your completed transfer form.

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SECURITIES TRANSFER FORM

Please complete this form and forward it to your broker or financial institution for them to initiate the transfer. Please advise the Grace Hospital Foundation of your donation and provide us with a copy of this form.

Donor Information

Name: _____

Home Address: _____

City/Province: _____ Postal Code: _____

Email: _____ Phone: _____

Delivering Institution Information

Institution Name: _____

Institution Address: _____

Account #: _____

Details of Securities Being Transferred

Name of Security: _____ # of Shares: _____

Approx. Value per Share (\$): _____ Approx. Total Donation (\$): _____

This form serves as authorization to transfer the above-listed securities to the account of the Grace Hospital Foundation. I acknowledge that I will receive a charitable tax receipt based on the closing price of the securities on the date they are transferred into the Grace Hospital Foundation's account.

I confirm that these securities are donated without restriction, and Grace Hospital Foundation has the right to sell them at its discretion.

Donor Signature: _____ **Date:** _____

Delivery Instructions

| | | | | |
|---------------|---------------|------------------------|---------------------------|-----------------|
| FINS#: T079 | DTC#: 5030 | CUID: WGDB | EUROCLEAR#: 9347 | ABA#: 021000018 |
| DEALER#: 9280 | REP CODE: LQQ | ACCOUNT#: 710-02020-14 | FEDWIRE: BK OF NYC/WGI | |

Receiving Institution:

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