



## DONATIONS OF PUBLICLY TRADED SECURITIES

Thank you for your interest in donating publicly traded securities to Science World.

Donating a gift of securities is a tax-efficient way to make a difference and minimize income taxes. Canadians who donate appreciated securities (stocks, bonds, mutual funds, etc.) directly to a charity eliminate capital gains tax on the investment. The capital gains exemption does not apply if you sell the securities first and then donate the cash proceeds.<sup>1</sup>

### Instructions for donating a gift of securities

The following instructions will assist you in donating shares to Science World. If you have any questions, please do not hesitate to contact us and we will be happy to assist you.

1. Complete the Transfer of Securities Form (page 2 of this document) with your broker and send it to both RBC and Science World via fax or email.

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2. Instruct your broker/delivering custodian to complete the transfer. Sending a copy of this form to your broker may provide sufficient authorization. You may also wish to follow up with your broker to help ensure your instructions are carried out as specified.
3. Upon receipt of the transferred securities to the Science World brokerage account, we will issue a charitable tax receipt based on the closing market value of the shares on the date they are received into our brokerage account.

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<sup>1</sup> This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for tax advice. You should consult your own tax advisors before engaging in any transaction

## TRANSFER OF SECURITIES FORM

In order to make your gift, please complete this form with your broker. If you do not have a broker, complete the form and send it directly to your delivering institution.

### Donor Information

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

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

City, Province, and Postal Code: \_\_\_\_\_

Phone #: \_\_\_\_\_

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

### Broker/Delivering Custodian Information (Broker/DC to complete)

Name of Broker: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name of Firm: \_\_\_\_\_ CUID#: \_\_\_\_\_

Broker Fax #: \_\_\_\_\_

Client Account #: \_\_\_\_\_

I hereby authorize the transfer in kind of the following securities to RBC DOMINION SECURITIES (CUID# DOMA, DTC #5002) for credit to account #8042199110 in the name of A.S.T.C Science World Society.

### Description of Securities

Name of Security: \_\_\_\_\_

CUSIP/ISIN: \_\_\_\_\_

Number of Shares/Units to transfer: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Thank you!**