



GIFTS OF PUBLICLY TRADED SECURITIES – INFORMATION SHEET

BACKGROUND:

On May 2, 2006, the Federal budget presented by the Canadian Government eliminated the capital gains tax on donations of publicly listed securities and stocks to registered charities such as Nicola Valley Health Care Endowment Foundation. Publicly listed securities include publically traded stocks, bonds and mutual funds. As a result, when donating any of these to NVHCE Foundation, you will realize two benefits:

1/ Exemption from Capital Gains Tax:

Normally, 50% of a capital gain from the sale of stock is taxable. When a stock is donated to a registered charity, however, the full capital gain realized is exempt and no tax is owed. The charitable donation can be carried forward and used to offset income tax up to five years after the gift has been made, as with any regular charitable contribution.

2/ Tax Receipt:

Donations of publically traded securities qualify for a charitable tax receipt for the full contribution amount, the income tax receipt value will be based on the *closing trade price on the day NVHCE Foundation receives delivery of the security.*

HOW TO MAKE A GIFT OF PUBLICLY TRADED SECURITIES TO NVHCE Foundation:

1/ To make a gift, please contact NVHCE Foundation to discuss your plans prior to the actual transfer of shares.

Contact us via email or via the contact form on our website:
nvhcef@gmail.com
www.nvhcef.com/contact-us

2/ Complete the *Share Transfer Form (attached)* and fax it to RBC Dominion Securities at (250) 372.9513

3/ Provide your investment advisor/brokerage with NVHCE Foundation's brokerage info:

Receiving Institution:	RBC Dominion Securities Inc.
CUID:	DOMA
Transit:	90823
Dealer/Rep code	9190 / T8C
Account No.:	823-09036-12
Account Name:	Nicola Valley Health Care Endowment Foundation
Account Currency:	Canadian funds
Contact:	Dan Sanford or Tracie Millar 250.372.8252 Toll free 1.866.372.8252 e-mail: dan.sanford@rbc.com / tracie.millar@rbc.com

4/ Tax receipts will be mailed 2-3 weeks after receipt of the transfer



**GIFTS OF PUBLICLY TRADED SECURITIES TO
NICOLA VALLEY HEALTH CARE ENDOWMENT FOUNDATION
SHARE TRANSFER FORM**

In order to complete a trade:

- 1. Fax this form to RBC Dominion Securities at (250) 372-9513.**
- 2. Instruct your broker to initiate the trade and transfer shares to Nicola Valley's account.**

To Be Completed By Donor:

Name of Donor _____ Daytime Phone # _____

Donor's Address: _____

Donor's Workplace (if applicable): _____

Name of Donor's Broker: _____ Broker's Phone#: _____

Donor's Brokerage Firm: _____

Donor's Brokerage Account Number: _____

Name of Security: _____ # of Shares Transferred: _____

Approx. Value of Each Share: _____ Approx. Total Amount of Donation: _____

Date of Transfer to NVHCE Account: _____

I understand that I will receive a Gift-in-Kind tax receipt from Nicola Valley Health Care Endowment Foundation, for the closing price, ***on the date the shares are received in account***, of these securities. These securities have been donated to NVHCE without restriction and can be sold by NVHCE at any time considered appropriate.

Donor Signature: _____ **Date:** _____

**Nicola Valley Health Care Endowment Foundation
PO Box 1423 Merritt, BC V1K 1B8
Charitable registration # 888510443RR0001**