



## Why Donate appreciated securities?

- Everyone must dispose of stock at one time or another.
- If you sell stock for cash, you pay the government capital gains taxes of 50% on the appreciated amount.
- Donating stock **eliminates capital gains taxes** and provides the donor with a tax deductible receipt for the full market value of the securities.

## Stock Donation Policy and Donation Procedures

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The Foundation Fighting Blindness (FFB) has an account established with its investment custodian, RBC Dominion Securities, to facilitate the receipt of donated publicly listed securities. They may be delivered to RBC Dominion Securities or arrangements can be made through the donor's money manager or broker. (Please see next page for details).

The donation receipt will equal the value of the security at the closing price on the date the gift is received in the FFB's account at RBC. An electronic transfer of securities usually takes about three days, but delays can occur, whether the stock is in book-based or in certificate form. Therefore, it is important to notify the FFB when a transfer-donation has been made. The FFB will dispose of the securities when they are received and direct the net proceeds to the area of greatest need, or a program of the donor's choice.

When a donor files their tax return, a Revenue Canada T1170 form must be submitted, identifying the donation of appreciated shares to a charity.

## Named Research Grants and Endowment Gifts

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To establish a named research fund, the Foundation staff will work with our donors to develop objectives that match both the FFB and each donor.

## Please Note

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The stock donation process is new to most people but it is simple. However, donors reviewing this information should consult with their professional advisor for independent advice. Examples presented by the FFB are for illustration purposes only, and should not be relied upon without the supervision of professionals.

**For more information, please call your stock broker or Ann Morrison, Director of Philanthropy at 416.360.4200 ext 232 or email [amorrison@ffb.ca](mailto:amorrison@ffb.ca).**





# Stock Donation Form

Donate now simply by filling out this form

### Direct Stock Transfer Instructions:

To protect your privacy, shares are transferred anonymously from your broker, thus the information provided below enables us to issue a charitable tax receipt.

- 1) Notify Ann Morrison, Director of Philanthropy by phone 416.360.4200 ext 232
- 2) Deliver this form to the Foundation Fighting Blindness (FFB) by fax 416.360.0060 or e-mail to [amorrison@ffb.ca](mailto:amorrison@ffb.ca)
- 3) Inform your broker

I/We, (Name) \_\_\_\_\_ hereby irrevocably authorize

Name of Brokerage Firm \_\_\_\_\_ Broker Name \_\_\_\_\_

Telephone # \_\_\_\_\_ Fax # \_\_\_\_\_

To transfer (#) \_\_\_\_\_ of my (Name of Shares) \_\_\_\_\_ Shares Symbol \_\_\_\_\_

From my account (#) \_\_\_\_\_ to FFB - Account No. 436-0828315

Signature \_\_\_\_\_ Date \_\_\_\_\_

Telephone # \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Prov \_\_\_\_\_ Postal Code \_\_\_\_\_

Delivery Notification:	FFB's Receiving Stock Broker:
<p><b>The Foundation Fighting Blindness</b>            Attn: Ann Morrison, Director of Philanthropy            12<sup>th</sup> floor - 890 Yonge Street            Toronto, ON M4W 3P4            Telephone: 416.360.4200 ext 232            Fax: 416.360.0060  <a href="mailto:amorrison@ffb.ca">amorrison@ffb.ca</a></p>	<p><b>RBC Dominion Securities Inc.</b>            Attn: Angeline Calimlin            Bay - Wellington Tower, BCE Place            181 Bay Street, #2200            P.O. Box 831, Toronto, ON M5J 2T3            Telephone: 416.842.3143</p>

For more information about our Foundation visit [www.ffb.ca](http://www.ffb.ca) Revenue Canada 11912 9369 RR0001

### Thank You!

I understand that when I transfer a gift of securities to the Foundation Fighting Blindness, I will receive a donation receipt for the fair market value on the date of transfer to the Foundation's broker, based on the closing price on the day when the shares are legally transferred to the Foundation's account at RBC Dominion Securities Inc., our custodial agent. The Foundation Fighting Blindness' policy for the sale of donated securities is that all shares will be sold as soon as possible after they have been received. I understand and agree the shares have been given without restriction and will be sold upon receipt or at the Foundation's discretion.