

We believe in their future. Now all we need is you.



Gift of Securities Toolkit

Gifts of Securities

to the Grandview Kids Foundation

By donating appreciated stocks, mutual funds, or stock options, you pay no tax on the capital gains and receive a tax receipt for the fair market value of the securities.

You can donate publicly traded securities like stocks, bonds or mutual funds to the Grandview Kids Foundation during your lifetime or in your will.

Why Grandview Kids?

Grandview Kids - founded in 1953 - is an independently operated not-for-profit organization. They are the only Children's Treatment Centre in Durham Region, providing specialized programs, outpatient clinical treatment and support to thousands of children and youth with physical, communication and developmental needs and their families.

The Grandview Kids Foundation - established in 1995 - is an accredited charity organization through Imagine Canada. The foundation raises funds to advance and support the specialized programs and rehabilitation services delivered by Grandview Kids in the Durham Region.

The Durham Region's population is quickly growing. With help from our caring community, the Grandview Kids Foundation supports Grandview Kids' children and youth with physical, communication and developmental needs by helping them to live, learn and play.

For more information about gifts of securities, please contact
Brigitte Tschinkel, CFRE and Executive Director:
+1 437-703-9180 or Brigitte.Tschinkel@grandviewkids.ca





Why donate securities?

A gift of appreciated securities is a worthwhile alternative to a cash gift. Flexible choices allow you to decide how you want to give, and the elimination of capital gains tax on gifts of appreciated securities provides you with a substantial tax incentive for donating stock.

Other benefits include:

- A charitable tax receipt
- No capital gains tax paid
- Satisfaction of seeing your gift put to good use today
- Recognition on the donor wall
- Naming opportunity in the New Grandview Kids

Gift of Appreciated Securities for Grandview Kids	Sell Shares and Donate Cash	Donate Shares Directly
Fair Market Value of Donation (a)	\$50,000	\$50,000
Adjusted Cost Base	\$10,000	\$10,000
Capital Gain	\$40,000	\$40,000
Taxable Capital Gain	\$20,000	\$0
Taxable Capital Gain @46% (b)	\$9,200	\$0
Tax Savings from Donation Tax Credit (c)	\$23,000	\$23,000
Total Cost of Donations = (a) + (b) - (c)	\$36,200	\$27,000

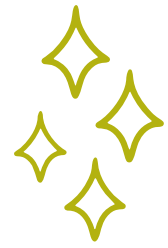
**Scenario for illustrative purposes only*

***Assumes gift made in Ontario at a marginal tax rate of 46%*

**Our legal name that should be included in your will is:
Grandview Children's Foundation
Charitable Registration Number: 89105 8547 RR0001**



Three simple steps



- 1.** Determine with your financial advisor which investments will make the most philanthropic and financial impact on you.
- 2.** Contact us to let us know you want to make a gift, and we will send you the correct transfer form.
- 3.** Complete our transfer form and instruct your broker to transfer your securities directly to the “Grandview Children’s Foundation.”

Gifts of Publicly Traded Securities to the Grandview Children’s Foundation

To donate your gift of stock to the Grandview Children’s Foundation, please continue with the following four steps:

- 1.** Instruct your broker to contact Gina Masciarelli, the Grandview Children’s Foundation Investment Advisor at Leith Wheeler and let her know that you would like to transfer securities to the Grandview Children’s Foundation brokerage account.
- 2.** Complete this form and return a copy to the Grandview Children’s Foundation. Attention: Brigitte Tschinkel brigitte.tschinkel@grandviewkids.ca or call +1 437-703-9180
- 3.** After confirming that your gift can be immediately liquidated, Brigitte will contact you or your broker, as appropriate, to provide the Grandview Children’s Foundation brokerage account information – to receive your gift of securities.
- 4.** After instruction by the donor, the delivering institution will initiate the trade and transfer your gift of securities to the Grandview Children’s Foundation.



Meet Clara

Impact story

Meet six-year-old Clara! She enjoys listening to music, working with puzzles, building things and she is a skilled reader. Clara also has Down Syndrome, but her diagnosis does not define her. In fact, with extra care and understanding, she will show you how smart and determined she can be! She requires help in some areas but given the time to work with her, “Clara can do great things in her own way, on her own time,” says Clara’s mom, Tanya.

“Clara accesses Grandview Kids services such as Speech-Language Pathology, Physiotherapy, Occupational Therapy and Social Work support. She has been working on improving her social skills and communication skills.

Introduced to Grandview Kids through Durham’s Infant and Child Development program, as a family, Clara and Tanya made many connections with different services and teams that helped Clara move forward.

Tanya knows that she can always approach Grandview Kids and say, “this is where we’re at and I need the help, and the help is always there.” Tanya believes that having Grandview Kids locally available for Durham Region families makes all the difference in accessing care.

Without Grandview Kids’ support in Clara’s early years, Tanya believes that Clara would not be thriving as she is today. Without a doubt, Tanya will forever be grateful. This is why she “wholeheartedly and will always be a champion for Grandview Kids.”



Scan QR Code to watch Clara and Tanya’s impact video!





To ensure a prompt and accurate receipt of your donation, please submit this form to Grandview Children's Foundation prior to the transfer of the security. We will provide an official tax receipt after the donation has been successfully deposited.

Grandview Children's Foundation
600 Townline Road South
Oshawa, ON. L1H 0C8

Phone: (905) 728-1673 ex 2312
Fax: 905-728-2961
Email: foundation@grandviewkids.ca

Donor Information

Name: _____		
Mailing Address: _____		
City: _____	Province: _____	Postal Code: _____
Phone: _____	Email: _____	

Donor's Broker / Delivering Institution Information

Name of Institution: _____		
Address: _____		
Broker's Name: _____	Fax: _____	
Phone: _____	Email: _____	
Client Account Name: _____	Client Account No.: _____	

Securities Transfer Information

Name of Security: _____	Cusip: _____
Number of shares/units: _____	Date of Transfer (Approx.): _____
Gift Designation: <input type="checkbox"/> Highest Priority <input type="checkbox"/> Future Strategic Priority	

Donor Authorization

Donor's Signature: _____	Date (Day/Month/Year): _____
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Grandview Children's Foundation Broker Information (Receiving Broker)

Credential Qtrade Securities Inc.		
Attention: Gina Masciarelli	Phone: 1.855.714.3800	Email: CQCPSupport@aviso.ca
Canadian Securities account information CUID: CRED Account No.: 532205A1		US Securities account information DTC: 5083 Account No.: 532205B1

Grandview Children's Foundation Charitable Registration # 89105 8547 RR0001