

GIFTS OF SECURITIES

BY DONATING APPRECIATED STOCKS, MUTUAL FUNDS, OR STOCKS 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 Grandview Children's Foundation either during your lifetime or in your will. You can help kids to live their best life, today and in the future.

WHY GRANDVIEW KIDS

There are 19,000 children and youth in Durham Region who need Grandview's help, with 11,000 waiting to get into services.

With help from our caring community, Grandview Kids empowers children and youth with physical, communication, and developmental needs by helping them to move, engage, and communicate to their full potential. Our kids have dreams for the future that we help them follow. As the only children's treatment centre in Durham Region, we exist to make sure that every family in Durham Region has access to the life-changing therapy and programs.

Alejandra, Grandview kid



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

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%

THREE SIMPLE STEPS

1. Determine with your financial advisor which investments will make the most philanthropic and financial impact to you.
2. Contact us to let us know you would like 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 Grandview Children's Foundation.

MEET ALEJANDRA

Alejandra's has a favourite sparkly t-shirt that says it all. "Always Dream Big." My six-year-old daughter and I do that every day, in ways most people take for granted.

Born with Spina Bifida and Hydrocephalus, Alejandra faced many surgeries. Her first operation took place the day after she was born to close the hole in her spine and the exposed nerves. The second one shortly after, drained fluid from her brain. And most recently, an operation modified her bowels and bladder.

She is affected from the waist down and has some movement in her legs. However 90% of her time is spent in a wheelchair.

Since the early days of Alejandra's life, Grandview played a key role in her journey. Referred to Grandview at just under one year of age, she worked with occupational therapists, physiotherapists and speech pathologists in 6-week blocks on fine motors skills, crawling and walking. When she received a stem cell treatment out of the country, her Grandview physiotherapist assessed her before and after. She was crawling within days.

She likes going to Grandview. For her, it's fun and hard work combined. There is someone there teaching her how to do things independently. Things like buttoning her jacket or doing up her zipper. Aside from the therapeutic services, Grandview has provided support, information and guidance to funding resources.

For more information about gifts of securities, please contact the Brigitte Tschinkel CFRE,
Executive Director at: (905) 728-1673 ex 2312 or Brigitte.Tschinkel@grandviewkids.ca

GIFTS OF PUBLICLY TRADED SECURITIES TO GRANDVIEW CHILDREN'S FOUNDATION

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

1. Instruct your broker to contact Gina Masciarelli, 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 Grandview Children's Foundation.
Attention:
Brigitte Tschinkel
brigitte.tschinkel@grandviewkids.ca
or call 905.728.1673 ext. 2312.
3. After confirming that your gift can be immediately liquidated, Brigitte will be in touch with you or your broker, as appropriate, to provide 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 transfers your gift of securities to Grandview Children's Foundation.





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