

Donation Form for Gifts of Publicly Traded Securities

Thank you for your interest in making a donation of publicly traded securities to the Royal Alexandra Hospital Foundation (RAHF).

When you are ready to donate, follow these **two easy steps**:

1. Complete this form and send a copy to the **Royal Alexandra Hospital Foundation**, Attention: **Jonathan Jaucian** jjaucian@royalalex.org phone **780.221.5255** or **Yuki Richardson**, yrichardson@royalalex.org, **780-863-8616**
2. Instruct your Broker to initiate the transfer of the shares to the Royal Alexandra Hospital Foundation's broker.
Please advise your investment broker to contact Jonathan or Yuki to obtain the investment account number.

To be completed by Donor:

Donor Name: _____

Mailing Address: _____

Phone Number: _____ Fax Number: _____

Email: _____

I would like this gift to support: ☐ The Hospital's greatest needs

☐ _____

(please indicate specific program or area of care)

Please transfer the following securities as an "in kind" donation:

Delivery Institution Name : _____

Name of Broker: _____ CUID: _____

Client Account: _____

Address: _____

Phone Number: _____ Fax Number: _____

Name of Securities/ Fund: _____ No. of Shares: _____

CUSIP/ISIN/SEDOL#: _____

Authorization of Donor: _____ Date: _____

Signature

(day/month/year)

Recipient Name:

Royal Alexandra Hospital Foundation
10240 Kingsway NW
Edmonton AB T5H 3V9
Canadian Charitable Registration Number **11912 6217 RR0001**

Transfer Information:

TD Waterhouse FINS / CUID and DTC Numbers:

FINS - T007 (Institution Number)

CUID – GIST (CDN) (Broker code)

DTC – 5036 (USD)

Swift Code: TDOMCATTOR

Dealer code – 9265

Dealer code (PIA)- 9834

DSC rep code - 0000

Forward the Original of this form to your Broker or Investment Representative and fax a copy **OR** scan and email a copy to:

TD Wealth Private Investment Advice Attention:

Hala Abdul Fattah

Client Service Associate

T: 780-420-2307 | F: 780-448-8962

hala.abdulfattah@td.com

Sotos Michailides, CFA, PFP

Senior Investment Advisor

T: 780-448-8377 | F: 780-448-8962

sotos.michailides@td.com

Comparing Cash VS Donations of Securities

If you sell a security, you pay tax on 50% of the capital gain.

However if you donate a gift of securities to the Royal Alexandra Hospital Foundation the **taxable gain is completely eliminated**.

You receive a tax receipt for the full market value of the security based on the closing trading price on the day the Foundation receives the security.

Example	Donation	of cash vs securities to the Royal	Alexandra Hospital Foundation
		Sell security & donate proceeds	Donate security "in kind"
Market value of security		\$10,000	\$10,000
Cost base		\$5,000	\$5,000
Capital gain		\$5,000	\$5,000
Capital gain inclusion rate		50%	0%
Taxable capital gain		\$2,500	\$0
Tax on capital gain (assuming 48% marginal rate)		(\$1,200)	\$0
Donation tax credit (54%)		\$5,400	\$5,400
Net Tax Savings		\$4,200	\$5,400
Net After-tax cost of donation		\$5,800	\$4,600
By donating	the after tax cost of your gift is reduced by \$1,200 on a gift of \$10,000.		

For further information or to discuss your donation and recognition options please contact:

Jonathan Jaucian, Finance Officer

Royal Alexandra Hospital Foundation

780.221.5255 jjaucian@royalalex.org

OR

Yuki Richardson, VP Finance & Operations, and CFO

Royal Alexandra Hospital Foundation

780-863-8616 or 780-735-4024

yrichardson@royalalex.org



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