

The Better Days Society can now accept donations of publicly traded stocks (listed on the TSX), which provides many benefits to the donor!

Benefits To An Individual Donor

In situations where there is an existing gain in the value of a stock, by donating the actual stock (instead of selling it, paying capital gains tax and then donating the balance), you will receive a tax receipt for the actual amount of funds that Better Days Society gets upon selling it. Also, you will not pay capital gains tax on the transaction. For example:

- you buy shares in a company for a total of \$3,000
- the share value is now \$5,000
- you donate the shares – you will receive a tax receipt for \$5,000 to claim on your next tax return ... in addition, you do not pay taxes on the \$2,000 gain

NOTE: This is a very general example and should not be construed as financial advice. As taxation rules can/will change from time to time, you should seek any advice in this matter from your accountant and/or investment manager.

Additional Benefits If Donated From A Corporation/Personal Holding Company

For donors who have a personal holding company, there are additional benefits if the shares are donated directly from the holding company investment accounts. Please contact your accountant and/or investment manager for more information.

Donate in four easy steps:

1. **Download** the [CIBC WG Transfer of Shares Form](#).
2. **Complete all sections**, most importantly, the CUSIP# which will be provided by your broker or investment advisor. This number serves as a transaction number in case the transfer needs to be tracked.
For privacy reasons, your broker may not be able to disclose your name to us, so please complete the Donor/Client Information, including your daytime phone number.
3. **Send the completed transfer form to your broker** or investment advisor who will initiate and be responsible for the transfer. If you are using a self-directed brokerage, you will need to call your financial institution and ask them to initiate the transfer. The Foundation is not responsible for the transfer.
4. **Notify the Foundation** by emailing a copy of the completed transfer form to BetterDaysSociety@outlook.com.

This step is important because securities are transferred into our account on an anonymous basis. Notifying us will ensure you receive our thanks, any appropriate recognition, and your official receipt for income tax purposes.

Note: Your receipt will be valued based on the funds received when the shares are legally sold after being transferred to our account at our custodial agent, CIBC Wood Gundy. All shares will be sold as quickly as possible after transfer.