

Benefits of Donating Stock



Scenario	Scenario A	Scenario B
Fair Market Value (FMV) at time of disposition	\$10,000	\$10,000
Cost Base (Original cost of shares)	\$2,000	\$2,000
Capital Gain	\$8,000	\$8,000
Taxable Gain (% of Gain)	\$4,000 (50% of gain)	\$0 (0% of gain)
Tax Credit from Donation (46%* of FMV)	\$4,600	\$4,600
Tax on Gain (46%* of Taxable Gain)	\$1,840	\$0
Tax savings	\$2,760	\$4,600

Scenario A

Donor sold the Appreciated Publicly Trade Stock or Security and donated the cash proceeds (No capital gains reduction)

Scenario B

Appreciated Publicly Traded Stock or Security (100% capital gain reduction)

*(Marginal tax rate at 46% for illustration)

How to Donate Stock

Download and complete all sections of the transfer form on our website at www.givestock.ca, especially the CUSIP # (which is provided by your broker/investment advisor) and identifies your transaction to avoid transfer delays.

Call or email us to let us know you are donating a Gift of Stock. Return a copy of the completed form to William Osler Health System Foundation, to ensure you receive your official receipt for income tax purposes. Forms can be faxed confidentially to **(905) 494-6863** or sent by mail to:

Susan James
 Controller
 William Osler Health System Foundation
 2100 Bovaird Drive East
 Brampton, ON L6R 3J7
 Phone: (905) 494-6857
 Fax: (905) 494-6863
 E-mail: givestock@oslerfoundation.org

Note: Forms sent by mail will delay the start of the transfer process, and may affect the ultimate receipt value. Please notify the Foundation by telephone at 905-494-6890 if you send by mail. Ensure that a copy of the completed form is forwarded to your broker/investment advisor who will be responsible for the transfer.



Donations of securities will pay dividends to health care at William Osler Health System for years to come



A Smart Giving Opportunity

Donations of publicly traded securities to registered charities are not subject to the capital gains tax. The complete removal of the tax by federal legislation in 2004 has made a huge impact on charitable giving in Canada.



William Osler Health System Foundation donors can make stock donations that benefit their financial plan.

Donations of shares carry significant tax advantages and substantially reduce the after-tax cost of giving, offering a great option for donors to give publicly traded securities.

By donating the shares to a registered charity like William Osler Health System Foundation, the capital gains are not taxable, and the total value of the gift is eligible for a charitable tax receipt. It's possible for donors to make a donation without affecting cash flow or incurring tax liabilities.

Meet the Armstrongs



Charles and Lenore and Armstrong know a winner when they see it.

The long-time Brampton residents have seen great success in the breeding and racing of Standardbred horses, ranking among the leading breeders in North America.

Charles and Lenore recognize the importance of excellent community health care for the people of Brampton and surrounding areas. The Armstrongs met with the Foundation and discussed several giving options, including gifts of securities. In the end, a gift of stock appealed to them most.

“We chose to donate stock because it made the best sense for us. The Foundation met with us, discussed the advantages and processed everything with our financial advisor.”

The Armstrongs are investing in health, and you can too with a gift of securities to William Osler Health System Foundation.

Transforming Health Care

As the premier health system in Canada, Osler strives to provide health care excellence through safe and compassionate care.

Our donors have helped to build one of the most modern hospitals in Ontario at Brampton Civic Hospital.

The focus now turns to redevelopment funding needs at Etobicoke General Hospital and Peel Memorial Centre for Integrated Health & Wellness.

Support is also critical to programming needs of health care specialists and the equipment needs of physicians.

You can help by making a gift of stock. Your gift can be designated to the area of greatest need, or to any program at any hospital at Osler.

