



GIFT OF STOCK AND SECURITIES



Have you invested in stocks and securities that have increased in value? Did you know that when you donate securities you can give more while avoiding paying capital gains taxes.

A donation of stocks and securities is a strategic and cost-effective way to make a contribution to supporting people with developmental disabilities. By gifting your shares directly to Cherish, we receive a higher donation and you receive an official receipt showing a larger financial contribution, providing considerable tax benefits for you.

Why donate Stocks and Securities?

- No capital gains tax on the donated securities
- Tax receipt provided for the fair market value of the securities at the time of the transfer
- Your support to Cherish will be greater

Steps to Donate Stocks and Securities

1

Complete all sections of this form, which is used for the purpose of transferring, tracking, and processing your donation of stocks and securities.

2

Send the completed form to your broker or investment advisor who will initiate, and be responsible for the transfer.

Cherish cannot initiate the transfer. If you do not have a broker, fax this form to your investment firm. If you are using a self-directed brokerage, you will need to contact your financial institution and ask them to initiate the transfer.

3

Email this completed form to info@cherishis.org or bring it to a TD branch. Once the transfer is received, an official receipt will be sent to you.



See the chart below to understand how a \$1000 investment could provide you with a higher charitable tax credit and a significant donation to Cherish!

	Sell securities for cash. Donate after-tax proceeds	Donate securities directly to Cherish
Original Cost of Securities	\$ 1,000.00	\$ 1,000.00
Current Market Value	\$ 5,000.00	\$ 5,000.00
Capital Gain	\$ 4,000.00	\$ 4,000.00
Tax on Capital Gains	\$920.00	\$0.00
Donation Amount After-Tax	\$ 4,080.00	\$ 5,000.00
Your Charitable Tax Credit	\$ 1,876.00	\$2,300.00

Cherish gets \$920 more! Your charitable tax credit is \$424 more!

*The chart provides general figures for illustration purposes and does not constitute legal or financial advice. We encourage you to seek professional legal and/or financial advice prior to making any financial decisions.



Your donations of securities help provide essential programs for people with developmental disabilities to develop their skills and potentials in order to live a fulfilling and joyful life!

Donation of Publicly Traded Securities to Cherish Integrated Services



- Letter of Instruction -

Thank you for supporting Cherish Integrated Services with a gift of securities. Transferring securities (stocks, bonds, mutual funds) is simple, and may result in significant tax savings for you.

1. Donor Information

Name _____
Address _____
City _____ Prov. _____ Postal Code _____
Phone _____ Email _____

2. Broker/Delivering Custodian Information

Company Name _____ FINIS# _____
Broker Name _____
Client Account Name _____
Address _____
City _____ Prov. _____ Postal Code _____
Phone _____ Email _____

3. Securities to be Transferred

Number of Shares _____
Name of Security _____
CUSIP# _____
Expected Date of Transfer to Cherish Integrated Services _____

4. Transfer Securities In Kind to:

Delivery of stocks and securities should be made via

TD Waterhouse:

Reference Account Name: Cherish Integrated Services

Reference Account (CAD)#: 73L0F8A

Reference Account (USD)#: 73L0F8B

TD Waterhouse

3500 Steeles Avenue East

Markham ON Canada

L3R 0X1

CDS #: GIST DTC#: 5035

Dealer#: 92650000 Tel #: 1-800-465-5463

I authorize this transfer as a charitable donation to Cherish Integrated Services. I agree that Cherish Integrated Services, or its representatives, may contact my broker for the purpose of concluding this transaction.

Please send this original form to any TD branch or Cherish Integrated Services for transfer instruction.

Signature of Donor _____ Date _____

