

Get Hands-on with CanadaHelps Fundraising Tools for Holiday Success



CanadaHelps is a non-profit social enterprise serving charities & donors.



CanadaHelps is a charity that helps charities. We ensure all Canadian charities – most notably the smallest ones that need it the most – have access to the online fundraising tools, technology, and education they need to succeed. Because we're a charity, our fees are a fraction of those of the for-profit alternatives.



For donors, we offer a one-stop shop for supporting any registered Canadian charity online. CanadaHelps makes giving easy. Easily explore and discover new causes. Give once or monthly, donate securities, or increase your impact fundraising for charity. Enjoy instant or anytime access to all your charitable tax receipts.

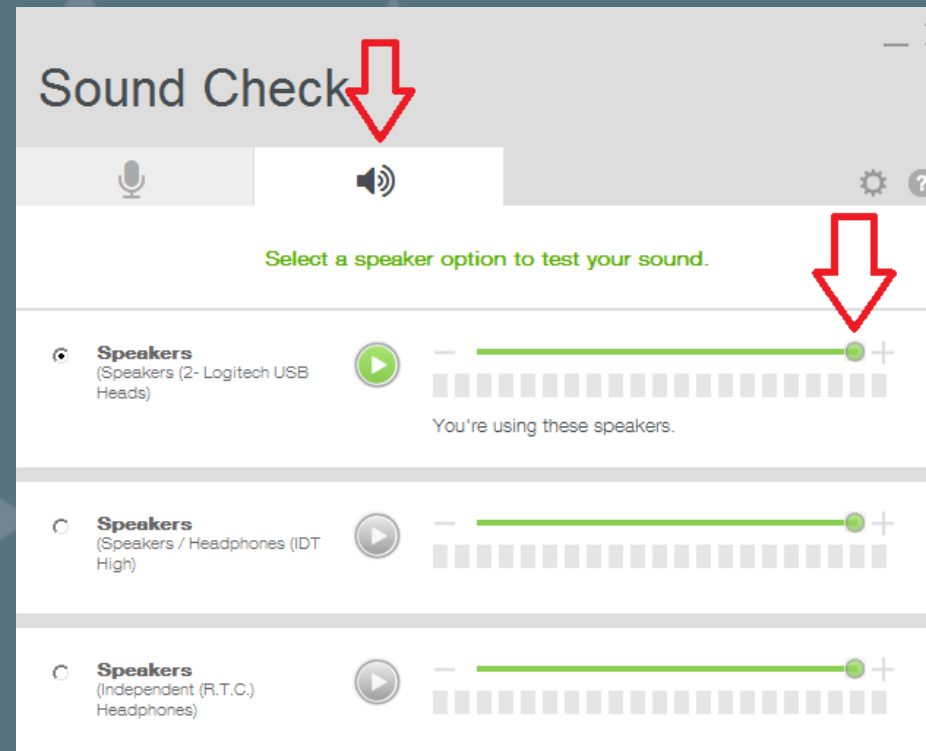
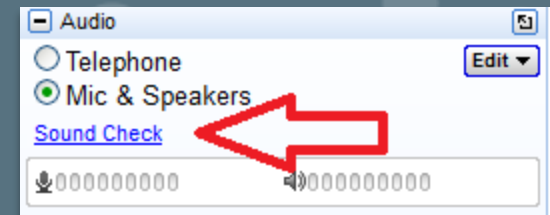


At a glance: Trusted for over 16 years, over 17,000 charities rely on our non-commercial online fundraising platform and more than 1 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting, and operate on less than 1.8% of donation revenue.

Webinar Reminders

Trouble hearing us?

- Turn up your computer's volume.
- Click Sound Check under Audio in your GoToWebinar Panel.
- Select the speaker tab and then turn the volume on the speaker to the far right for maximum volume.



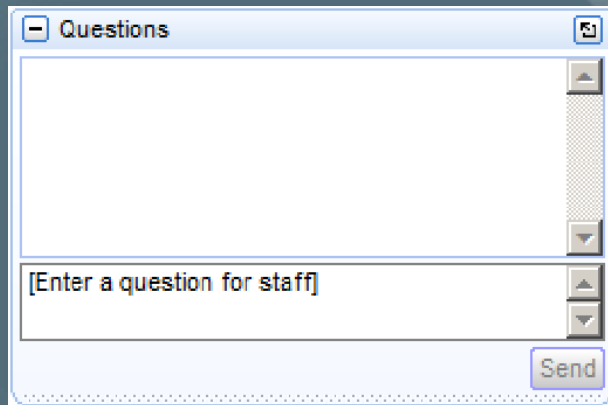
Webinar Reminders

- For the best webinar experience, close all other applications.
- **Yes!**
The links to the webinar slides and recording will be emailed to you within 24 hours. You'll be able to watch the recorded video on demand.



Webinar Reminders

- You can hear us, but we can't hear you.
- Have questions?
Type them into the Questions Log at anytime.



A screenshot of a web application window titled "Questions". The window has a large text area for input, a smaller text area at the bottom with the placeholder text "[Enter a question for staff]", and a "Send" button at the bottom right. The window also features a scrollbar on the right side of the main text area.

Hello and Welcome!

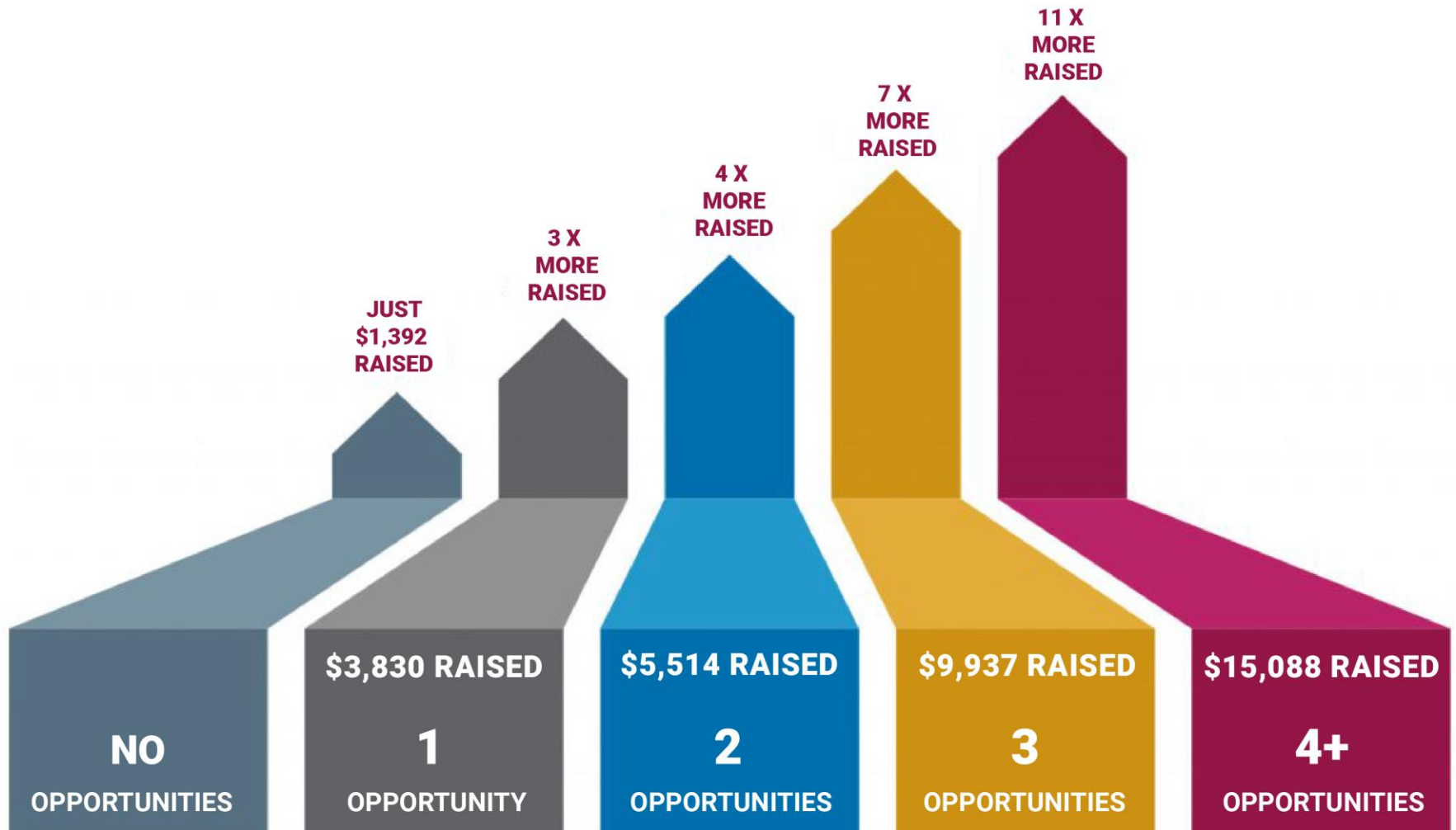


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Last Week - Take Advantage!



Where to Find These Resources? Charity Life!



Français Help  Giving Basket Jacob O'Connor ▾

[Donate](#) | [Explore](#) | [Fundraise](#) | [Why CanadaHelps](#) | [Blog](#) | [For Charities](#)

[Home](#) > [Charity Life](#)

Charity life

Your place for inspiration and information on online fundraising for your charity.

Charity Life by CanadaHelps – Recent Posts



OFFICIALLY HERE! CanadaHelps Multi-Step Donation Forms

Posted on November 22, 2017 by CanadaHelps

Ready to Step It Up This Holiday Season? Multi-Step Donation Forms – the seamless, customizable donation pages everyone has been talking about – are here ... [Read more](#)



Webinar: Get Hands-on with CanadaHelps Fundraising Tools for Holiday Success

Posted on November 14, 2017 by CanadaHelps

Join our hands-on, how-to webinar where we walk you through how to accomplish the following 4 critical steps to raising more this holiday. • Get your ... [Read more](#)



Webinar: 7 Free Ways to Attract New Donors on CanadaHelps this Holiday

Posted on November 14, 2017 by CanadaHelps

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About CanadaHelps



CanadaHelps' Fundraising Solutions

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<https://www.canadahelps.org/en/charity-life/>

Free Holiday Fundraising Guide

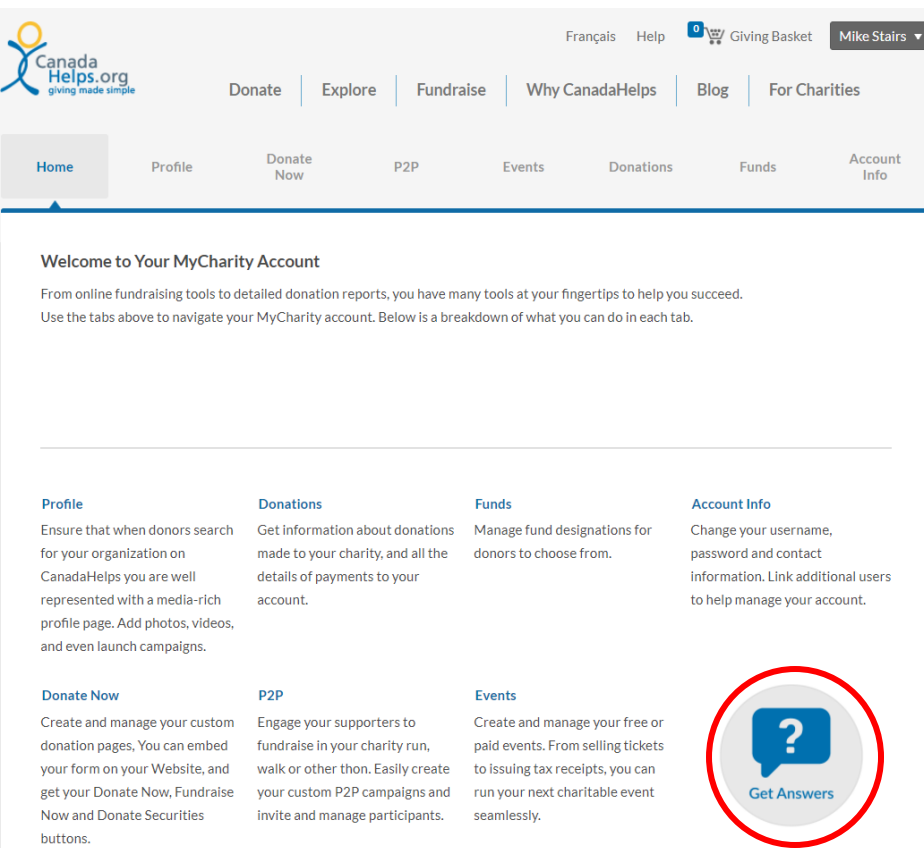
Boost Your Digital Holiday Fundraising Results!

Download our FREE guide:

bit.ly/canadahelps-holiday




NEW: Charity (and Donor) Help Portal



The screenshot shows the 'MyCharity Account' page on CanadaHelps.org. The top navigation bar includes 'Français', 'Help', 'Giving Basket', and 'Mike Stairs'. Below this is a secondary navigation bar with 'Donate', 'Explore', 'Fundraise', 'Why CanadaHelps', 'Blog', and 'For Charities'. A third navigation bar contains 'Home', 'Profile', 'Donate Now', 'P2P', 'Events', 'Donations', 'Funds', and 'Account Info'. The main content area is titled 'Welcome to Your MyCharity Account' and includes a paragraph about fundraising tools. Below this are four columns: 'Profile', 'Donations', 'Funds', and 'Account Info', each with a brief description of the tools available. A red circle highlights a 'Get Answers' button with a question mark icon.

CanadaHelps.org giving made simple

Français Help  Giving Basket Mike Stairs ▼

Donate | Explore | Fundraise | Why CanadaHelps | Blog | For Charities

Home Profile Donate Now P2P Events Donations Funds Account Info

Welcome to Your MyCharity Account

From online fundraising tools to detailed donation reports, you have many tools at your fingertips to help you succeed. Use the tabs above to navigate your MyCharity account. Below is a breakdown of what you can do in each tab.

Profile

Ensure that when donors search for your organization on CanadaHelps you are well represented with a media-rich profile page. Add photos, videos, and even launch campaigns.

Donations

Get information about donations made to your charity, and all the details of payments to your account.

Funds

Manage fund designations for donors to choose from.

Account Info

Change your username, password and contact information. Link additional users to help manage your account.

Donate Now


Create and manage your custom donation pages. You can embed your form on your Website, and get your Donate Now, Fundraise Now and Donate Securities buttons.

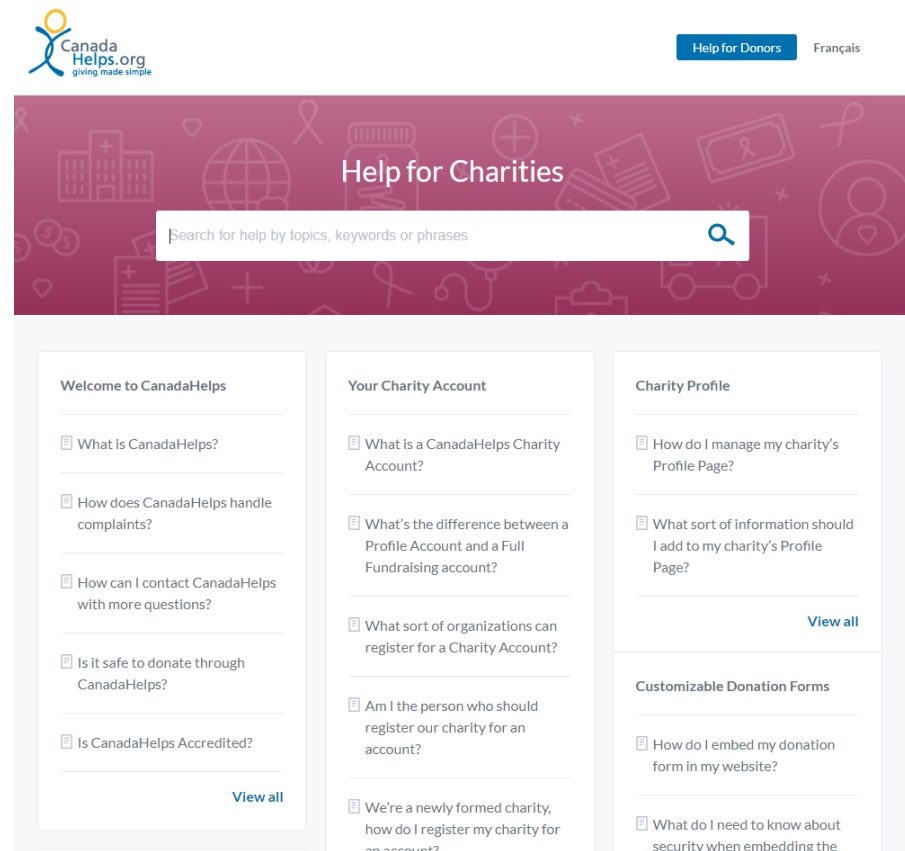
P2P

Engage your supporters to fundraise in your charity run, walk or other thon. Easily create your custom P2P campaigns and invite and manage participants.

Events

Create and manage your free or paid events. From selling tickets to issuing tax receipts, you can run your next charitable event seamlessly.






The screenshot shows the 'Help for Charities' page on CanadaHelps.org. The top navigation bar includes 'Help for Donors' and 'Français'. Below this is a search bar with the text 'Search for help by topics, keywords or phrases'. The main content area is divided into three columns: 'Welcome to CanadaHelps', 'Your Charity Account', and 'Charity Profile'. Each column contains a list of questions and a 'View all' link. A fourth column, 'Customizable Donation Forms', is also present.

CanadaHelps.org giving made simple

Help for Donors Français

Help for Charities

Search for help by topics, keywords or phrases 

Welcome to CanadaHelps

- What is CanadaHelps?
- How does CanadaHelps handle complaints?
- How can I contact CanadaHelps with more questions?
- Is it safe to donate through CanadaHelps?
- Is CanadaHelps Accredited?

[View all](#)

Your Charity Account

- What is a CanadaHelps Charity Account?
- What's the difference between a Profile Account and a Full Fundraising account?
- What sort of organizations can register for a Charity Account?
- Am I the person who should register our charity for an account?
- We're a newly formed charity, how do I register my charity for an account?

Charity Profile

- How do I manage my charity's Profile Page?
- What sort of information should I add to my charity's Profile Page?

[View all](#)

Customizable Donation Forms

- How do I embed my donation form in my website?
- What do I need to know about security when embedding the

Switch to Our Newest and Most Efficient Technology As We Approach Year-End!

Generate 70% more in donation dollars!

Where does your Donate Now button link to on your website?

Charities that direct to a Customizable Donation Form earn

70% more in donations than those going to their CanadaHelps Profile Page.*



- ✓ 35% more visitors donate.
- ✓ Visitors give 22% more.
- ✓ Donations grow by 70%

Boost Your Digital Holiday Fundraising Results!

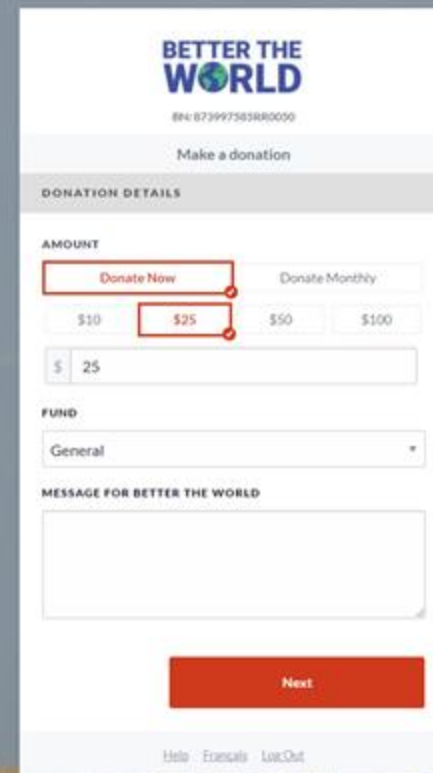
- Customized Thank You Message
- Branded Tax Receipts
- Custom 'Thank You' Landing Page
- E-Commerce Tracking
- All Occurring on Your Website

NEW: Multi-Step Forms

Help Make the World a Better Place!

Better The World is a registered Canadian charity that works to advocate for all people around the world. Using our project based approach, Better The World selects a handful of issues per year to focus our efforts. As part of our charitable efforts, our ongoing work encourages and challenges all global citizens to take part and help us better the world by making a difference of their own.

We work to encourage, empower, and help global change makers make a difference in both their local and global community. Past projects have included building homes for families in South America, feeding the hungry on the streets of Vancouver, Toronto, and Montreal, and sending students to school in varying parts of the world.



BETTER THE WORLD
884-673-9973/838R0000

Make a donation

DONATION DETAILS

AMOUNT

☒ Donate Now ☐ Donate Monthly

\$ 25

FUND

General

MESSAGE FOR BETTER THE WORLD

Next

[Help](#) [Feedback](#) [Log Out](#)

Google Analytics and Google Tag Manager Guide for Your CanadaHelps Donation Forms

Get Into Google Analytics and Tag Manager!

Download our FREE guide:

bit.ly/canadahelps-GA

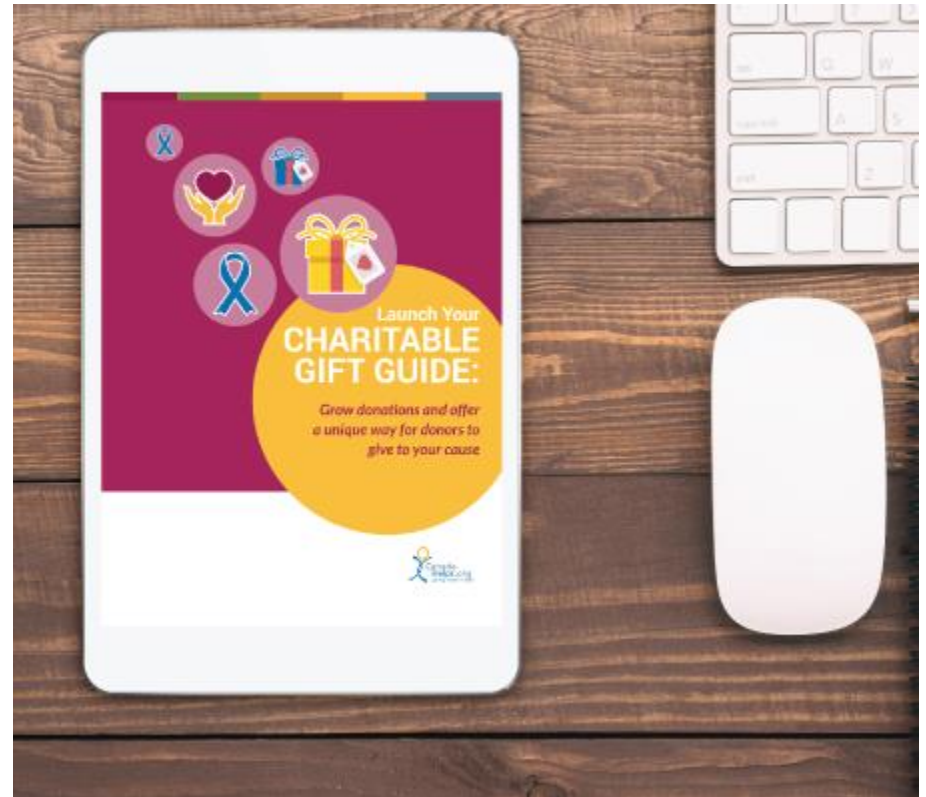


Charitable Gift Guide... Guide

Launch a Charitable Holiday Gift Guide!

Download our FREE guide:

bit.ly/canadahelps-gift-guide



What kind of securities can donors give?

Donation of Publicly-Traded Securities

Gifts to all charities: charitable organizations, public foundations, private foundations

Gifts of securities listed on prescribed public exchange, as well as bonds, mutual fund units and shares


We can accept securities from any country, but the funds will be converted to CAD when sent to your charities and donors will always receive a Canadian tax receipt



We make it easy for your donors

Canada's largest online mutual fund & securities donation platform.

1. **Click Donate Securities** on CanadaHelps.org and complete a short online pledge form.
2. **Complete the Letter of Authorization** and submit to your broker. They can download this on pledge confirmation page. We attach it to the email confirmation. If pledge still open we send 7 and 14 day reminders to you & broker.
3. **CanadaHelps does the rest** facilitating the sale of the security, confirming sale details and providing a tax receipt to you and disbursing funds to your intended charity or charities.



CanadaHelps CanadaDon
355 Adelaide Street West, Ground Floor, Toronto, Ontario M5V 1S2

Letter of Direction for Transfer of Publicly Listed Securities

Broker Information:
Investment Advisor Name: _____
Brokerage Firm: _____

In order to facilitate my donation to my selected charity(ies) at CanadaHelps.org, I give you authorization to transfer the following publicly listed security currently held in account #112233445566, in-kind to the account of CanadaHelps # 4393234622 held at ScotiaMcLeod.

Securities Information:
Name/Description of Security: _____
Number of Units: _____
Donor Reference Number: _____
*Must be included in the memo field of the transfer to ensure the donor receives a charitable tax receipt.

For Back Office Use:	Contact Information:
CUID: SCOT	Michael R. Chisholm
FINS: T085	Scotia Capital Inc.
DTC: 5011	Box 4085, Station "A"
Dealer Number: 9155	Scotia Plaza
Representative Number: 363	Toronto, ON, M5W 2X6
	Email: michael.chisholm@scotiawealth.com
	Phone: 905-337-5782
	Fax: 905-842-9001

Donor Administrator:
Name: _____
Signature: _____ Date: _____

This form can be used for your CanadaHelps pledge ID <REF #> only. Pledge ID <REF #> is valid until <Expiry Date>. If your pledge has expired or if you wish to make another donation of securities or mutual funds, you must first create your pledge in the CanadaHelps system. You will receive a unique Letter of Authorization form for each pledge. Modifications to the data on this form will render the pledge void. To make changes to this pledge form, please contact CanadaHelps.

Explains the process, timelines, and answers FAQs.

1. You will receive a confirmation email from your broker. **Note:** CanadaHelps will process your donation as directed in your online pledge.
2. Your broker will transfer the shares to our broker. It typically takes 1 to 2 working days for the transfer to settle within our account.
3. Once settled, we promptly sell the security. Once the proceeds of the sale are received in our account, your tax receipt is instantly issued based on the fair market value of the security at the end of the day on which the transfer went into our account. The amount(s) you selected to be disbursed to the charity reflects the price of shares at the time of sale less our CanadaHelps non-commercial fees. This follows industry best practices for processing of securities donations.

Do you use a Direct Investing platform such as RBC Direct Invest, TD Waterhouse Direct Investing, Scotia iTrade, or QuestTrade? You may need to complete the Letter of Authorization/Direction Form available from your Direct Investing firm. Use the information in the adjacent back office section to complete their form.

CanadaHelps is a registered charity (BN: 896568417RR0001) trusted by Canadian donors and charities for over 15 years. If you have questions about your securities, please contact us at **1-877-755-1595** or **info@canadahelps.org**. [Click here](#) to read the terms and conditions of your securities donation.

Direct investing platforms

We've got you covered!

Our letter of direction and process includes the information needed to fill out the online forms of the direct investing platforms.



Direct
Investing



NATIONAL
BANK
DIRECT BROKERAGE



Desjardins
Online Brokerage

SCOTIA
iTRADE[®]


QUESTRADE[®]



HSBC  InvestDirect

BMO  InvestorLine[®]



TD Direct Investing



Qtrade
Investor

Receipt Valuation

Securities tax receipt is based on closing price on the day the security was received by our broker— ***this is the value of the tax receipt (NOT proceeds of sale)***

Treatment of Gifts:

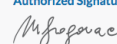
- Canadian best practice to sell immediately
- Sale price of receipt has no effect on tax receipt



CanadaHelps CanaDon
355 Adelaide Street West, Ground
Floor, Toronto, Ontario M5V 1S2

Registered Charity Number
89656 8417 RR0001

Official Tax Receipt For Income Tax Purposes

Received From John Smith 123 Lorem Ipsum Ave Toronto, Ontario L8B 1B3	Receipt Number R2D2C3PO Donation Date See donation details	Date Issued 11/09/2014 Location Issued Toronto, Ontario	Donation Amount \$ 234,000 Authorized Signature 
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Donation Details

Donation Date	Charity	Amount
01/02/2014	Lorem Ipsum Dolor	\$ 1,234.00

CanadaHelps is a registered charity trusted by Canadian donors and charities for over 15 years. Our mission is to increase charitable giving across Canada by making it easier to donate and fundraise online. If you have questions about this receipt, please contact us at 1-877-755-1595 or info@canadahelps.org.

For information on all registered charities in Canada under the Income Tax Act please visit Canada Revenue Agency: www.cra-arc.gc.ca/charities.

Timing

- CanadaHelps cannot guarantee donations will be processed for a 2017 tax receipt after Friday December 16 **BUT** we are working on gifts right up until the end of the year!
- Be clear about timing of donation, in-kind donations take longer than cash gifts to transfer, liquidate and receipt
- We can't direct timing of trades



Download our FREE guide:

A blue rectangular button with the word "Download" in white text. To the right of the button is a white cursor icon pointing towards it. There are several short, dark lines radiating from the top-left and bottom-left corners of the button, suggesting a click or download action.

Questions or Comments?

Get in touch!



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[@CanadaHelps](https://twitter.com/CanadaHelps)
[@CharityLifeCa](https://twitter.com/CharityLifeCa)

