

CanadaHelps Donor Webinar Series



Get Strategic With Your Giving: Securities & Mutual Funds Donations

**Presenter: Paul Nazareth, VP of Community Engagement at
CanadaHelps**



Paul Nazareth
Vice President,
Community Engagement

CanadaHelps
charities@canadahelps.org

CanadaHelps is a non-profit social enterprise serving charities and 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.



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.



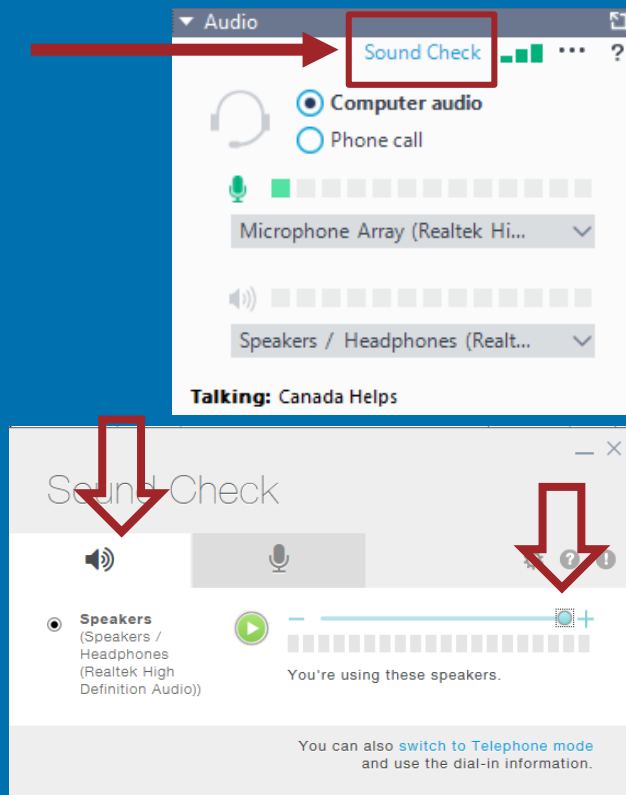
At a glance: Trusted for 16 years, over 17,000 charities rely on our non-commercial online fundraising platform and more than 1 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting.

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

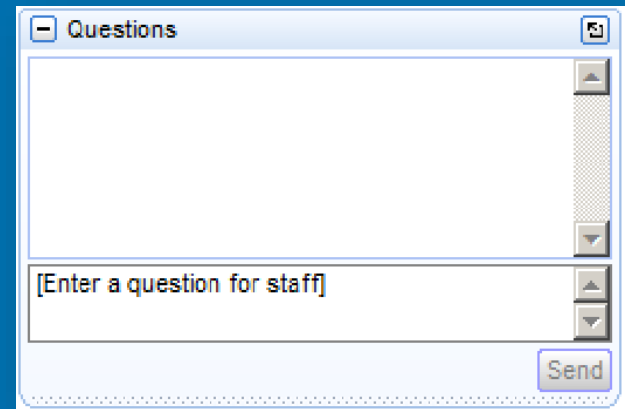


- For the best webinar experience, close all other applications.
- **Yes!** The links to the webinar slides and recording will be emailed to you within 24 hours. You'll be able to watch the recorded video on demand.

Webinar Reminders



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





Ready to get started?

The Benefits of Donating Securities



You benefit from the standard federal and provincial charitable tax credits, PLUS the capital gain is eliminated resulting in a larger tax credit.

Your favourite charities benefit as they receive your gift through CanadaHelps in cash.

You can give securities to any of Canada's 86,000 charities through CanadaHelps, all in one transaction, with one tax receipt.

Example: The Mechanics

Avoid the
capital gains tax.
Give more.
Get more back.

	Sell Shares and Donate Cash	Donate the Shares
Fair Market Value of shares	\$10,000	\$10,000
Adjusted cost base of shares	\$4,000	\$4,000
Capital Gain	\$6,000	\$6,000
Income inclusion for Capital Gain (\$60,000 x 50% of gain x 45% tax rate)	\$1,350	\$0
<i>Amount going to charity</i>	<i>\$8,650</i>	<i>\$10,000</i>
Charitable Tax Receipt	\$8,650	\$10,000
Tax credits for gift at 45%	\$3,892.50	\$4,500
Tax Savings after offsetting tax on capital gain	\$2,542.50 (\$3892.50 - \$1,350)	\$4,500

What kind of securities can I 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

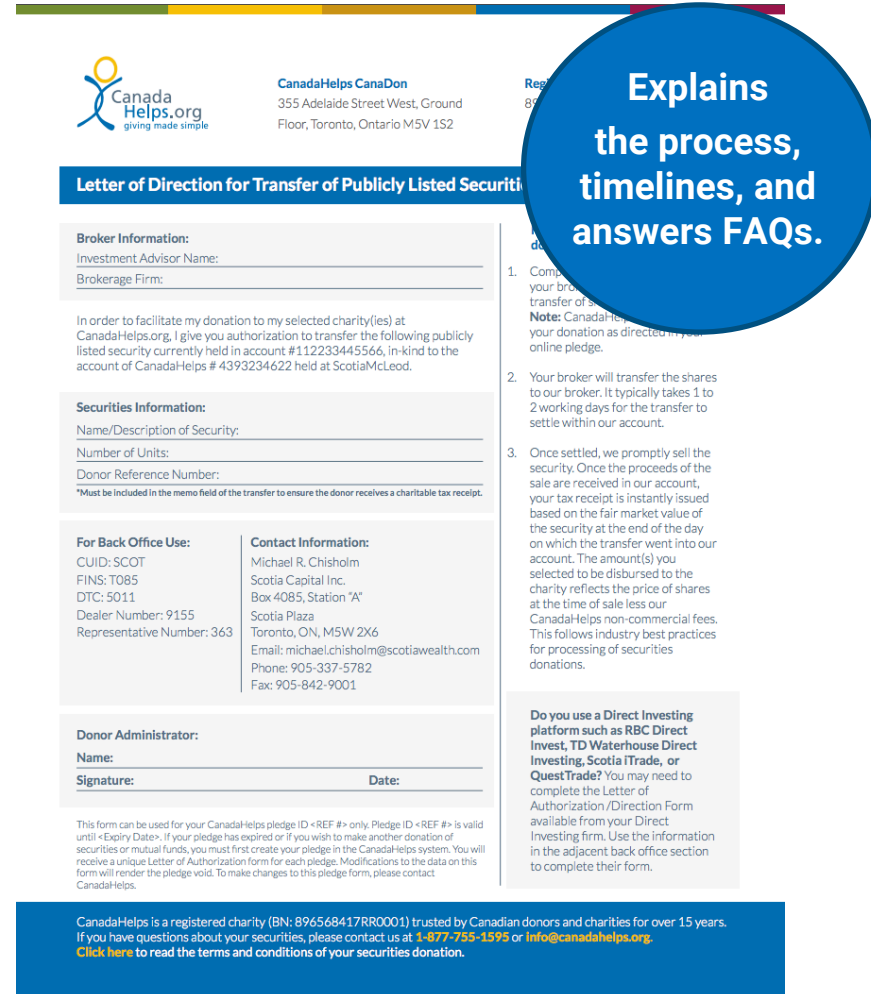
We can accept securities from any country, but the funds will be converted to CAD when sent to your charities and you will always receive a Canadian tax receipt



It's Easy to do!

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.



Explains the process, timelines, and answers FAQs.

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:
CUID: SCOT
FINS: T085
DTC: 5011
Dealer Number: 9155
Representative Number: 363

Contact Information:
Michael R. Chisholm
Scotia Capital Inc.
Box 4085, Station "A"
Scotia Plaza
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.

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.

If you are a direct investor.

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.

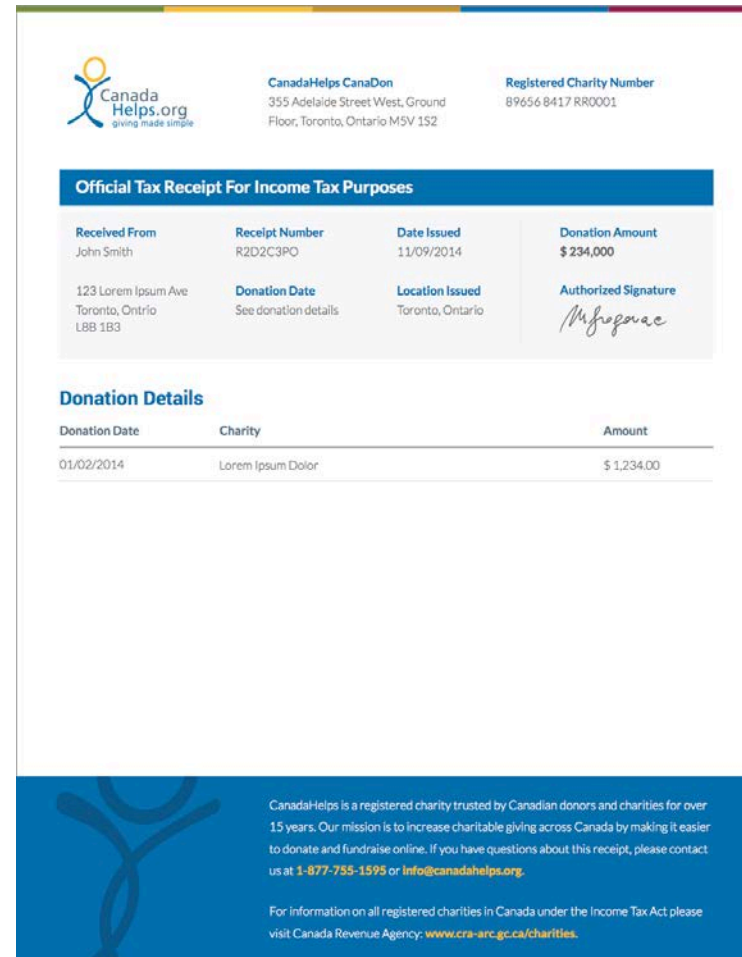


Receipt Valuation

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




Canada Helps.org
giving made simple

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 LBB 1B3	Receipt Number R2D2C3PO	Date Issued 11/09/2014	Donation Amount \$ 234,000
	Donation Date See donation details	Location Issued Toronto, Ontario	Authorized Signature 

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.

Please remember!

- Gifts of public securities must be donated **“in kind”** in order to qualify for elimination of gain
- Be sure your broker does not sell before transferring



Securities vs. Mutual Fund Donations

- CanadaHelps accepts Mutual Fund donations as part of our in-kind donation program.
- **BEWARE!** Mutual Funds take longer to process and sell – a consideration for your receipt and year-end gifts.

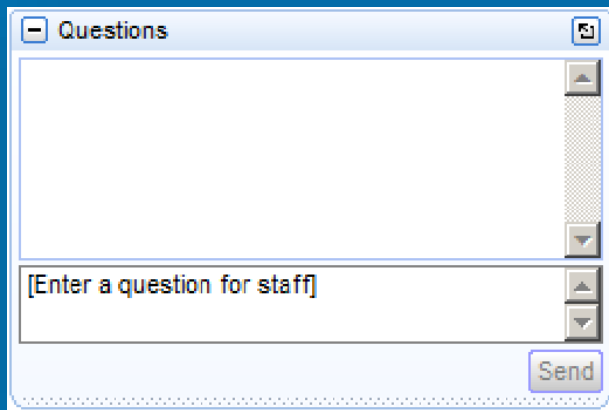


- CanadaHelps cannot guarantee donations will be processed for a 2017 tax receipt after Monday December 18th **BUT** we are working on gifts right up until the end of the year!
- Be clear about timing of donation, in-kind donations take longer than cash gifts to transfer, liquidate and receipt
- We can't direct timing of trades



Have questions? Ask Paul

Please type your questions into the Questions Log on your GoToWebinar panel or answer our quick poll!



A screenshot of a 'Questions' log window. The window has a title bar with a minus sign, the text 'Questions', and a close button. Below the title bar is a large, empty text area with a vertical scrollbar on the right. At the bottom of the window, there is a smaller text input field containing the placeholder text '[Enter a question for staff]' and a 'Send' button to its right.

Thank you!



Contact us with any questions.

marketing@canadahelps.org

www.CanadaHelps.org

416-628-6948

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instagram.com/canadahelps