

Increase your Charity's Fundraising Revenue with Donations of Securities



Paul
Nazareth



Jacob
O' Connor



Joanne
Perrier

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



Vision:

We envision a society in which all Canadians are committed to giving and participating in the charitable sector, and in which all charities, regardless of size, have the capacity to increase their impact.

Mission:

To inform, inspire, and connect donors and charities, and to democratize access to effective technology and education in the charitable sector.

For charities, CanadaHelps builds effective and affordable fundraising technology, and provides free training and education so that all charities, regardless of size, have the capacity to increase their impact and succeed in the digital age.

For Canadians, www.canadahelps.org is a convenient, safe and trusted, one stop destination for donating to (once, monthly, or gifts of securities), fundraising for, or learning about any charity in Canada.

**TRUSTED
SINCE 2000**

**\$1 BILLION
RAISED**

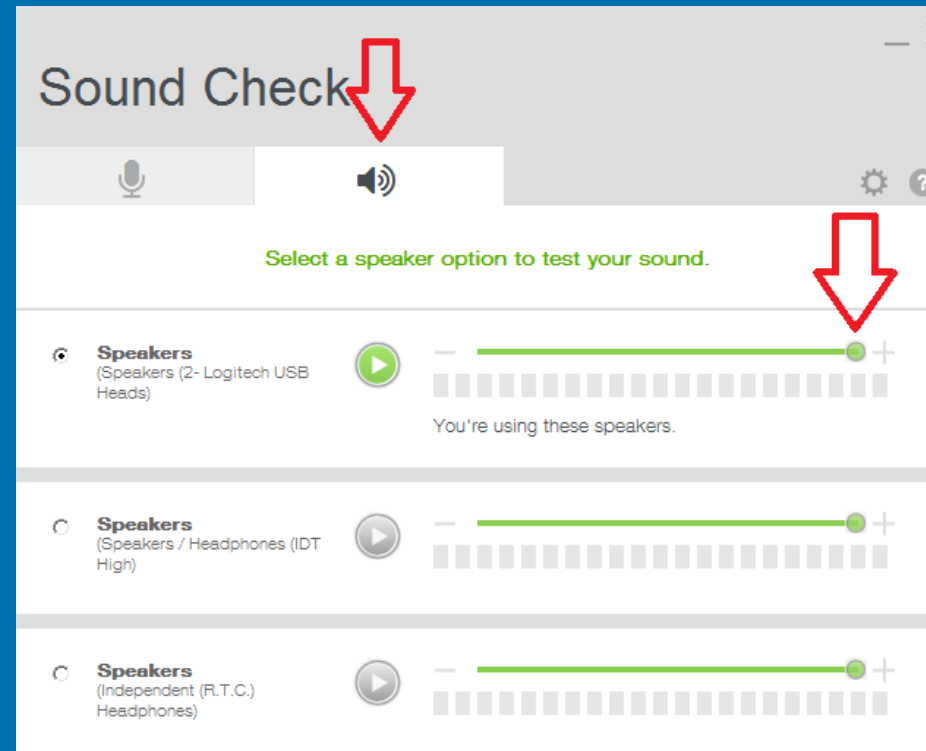
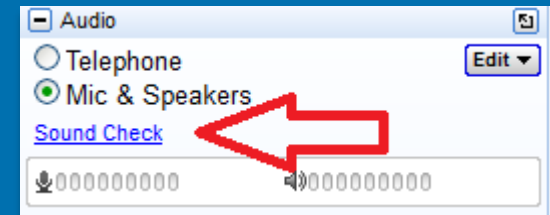
**2 MILLION
DONORS**

**20,000
CHARITY
PARTNERS**

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.

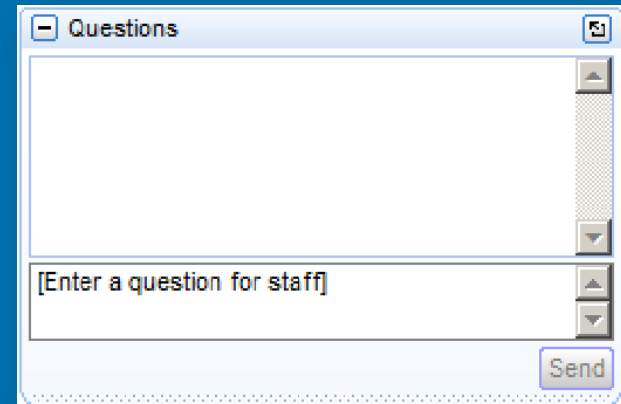


Questions or Comments?



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 interface titled "Questions". It features a large text area for input, a smaller text area below it containing the placeholder text "[Enter a question for staff]", and a "Send" button at the bottom right. There are also small up and down arrow buttons on the right side of the text areas.



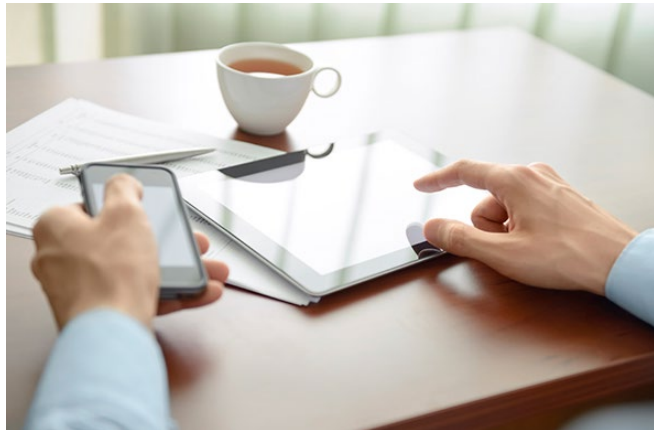
Paul Nazareth
Vice President,
Education & Development
Canadian Association of Gift Planners
pnazareth@cagp-acpdp.org



Paul Nazareth is a leader in Canada's philanthropic sector with over 19 years experience. Currently the Vice President, Education & Development at the Canadian Association of Gift Planners, he was most recently was VP here at CanadaHelps.

Paul has been a philanthropic advisor with Scotia Wealth and spent over a decade fundraising with charities like the University of Toronto and the 230 churches of the Catholic Church of Greater Toronto. He is on the board of several charities, is Chair of the Advisory Board at the Humber College postgraduate fundraising program, on the Advisory Council at the Carleton University Masters in Nonprofit Leadership, a national speaker with the Association of Fundraising Professionals, faculty with the advisor educator Knowledge Bureau and writes on philanthropy for a variety of publications as well as appearing on national television to speak about philanthropic trends and GivingTuesday.

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 just one tax receipt.

Donate to **one or MORE** charities!

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 (\$6,000 x 50% of gain x 45% tax rate)	\$1,350	\$0
Amount going to charity	\$8,650	\$10,000
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 (\$3,892.50 - \$1,350)	\$4,500

What kind of securities can donors give?

Donation of Publicly-Traded Securities

Gifts to all charities: charitable organizations, public foundations, and 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. You will always receive a Canadian tax receipt.



It's easy to do!

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

1. Visit CanadaHelps.org, search for your favourite charity and click **"Donate Securities"** on CanadaHelps.org and complete a short online pledge form.
2. Complete the letter of authorization and submit to your broker. You 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 to facilitate the sale of the security, confirming sale details and providing a tax receipt to you and disbursing funds to your intended charity or charities.

Letter of Direction for Transfer of Publicly Traded Securities or Mutual Fund Units

Complete and return this form to your investment firm authorizing the transfer of your in-kind donation of Securities

DONOR'S INVESTMENT FIRM INFORMATION:

Investment Firm: Direct Investing account

Advisor Name: Self-Directed Account

Investment Account Number: xxxxxxxx

SECURITIES TO BE TRANSFERRED:

Description: Stock Name Here

Code: Not required

Number of Units: 10.0000

TRANSFER SECURITIES IN KIND TO:

CanadaHelps CanaDon, Registered Charity: 89656 8417 RR0001

 Investment Account #: 4216326118

For Back Office Use:

CUID: DOMA

FINS: T002

DTC: 5002

Dealer Number: 9190

Representative Number: HKT

Memo Field Inclusion: 7055

Transfer Type: Book Value

CanadaHelps Broker Contact:

Ryan Son Kee, FSA, CFA, MBA

RBC Dominion Securities

181 Bay Street, Suite 2200

Toronto, ON M5J 2T3

Email: DonorHelp@rbc.com

Phone: 416-842-1120

Fax: 416-842-7282

I authorize this transfer to the above noted CanadaHelps account, held at RBC Dominion Securities, so CanadaHelps can disburse the proceeds of my charitable donation to the charity or charities I selected in my online pledge.

Donor Name: Joanne Perrier

Donor Signature: _____ Date: 2019-10-09

CanadaHelps is a registered charity. Since 2000 we've provided a one-stop shop to donate or fundraise for any Canadian charity. We also provide charities with open access to the online fundraising tools they need to accept donations from their website. Learn more at www.CanadaHelps.org.

Explains the process, timelines, and answers FAQs.

Timelines:

It typically takes 1 - 2 days for transferred shares to arrive in our account. For Mutual Funds, an additional 1 - 3 days may be required for the Mutual Fund Company to update the broker on file. Once received, we promptly sell the assets. Once the account settles (typically 2, but up to 30 days for mutual funds), we will send you a confirmation email with your tax receipt, and queue disbursement to your chosen charity(ies).

Your Charitable Tax Receipt:

Following CRA requirements, your tax receipt is 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) disbursed to the charity(ies) you selected reflects the price of shares at the time of sale less our noncommercial fee posted on our website.

We're here to help!

Contact us at 1-877-755-1595 or info@canadahelps.org

If you donor is 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.



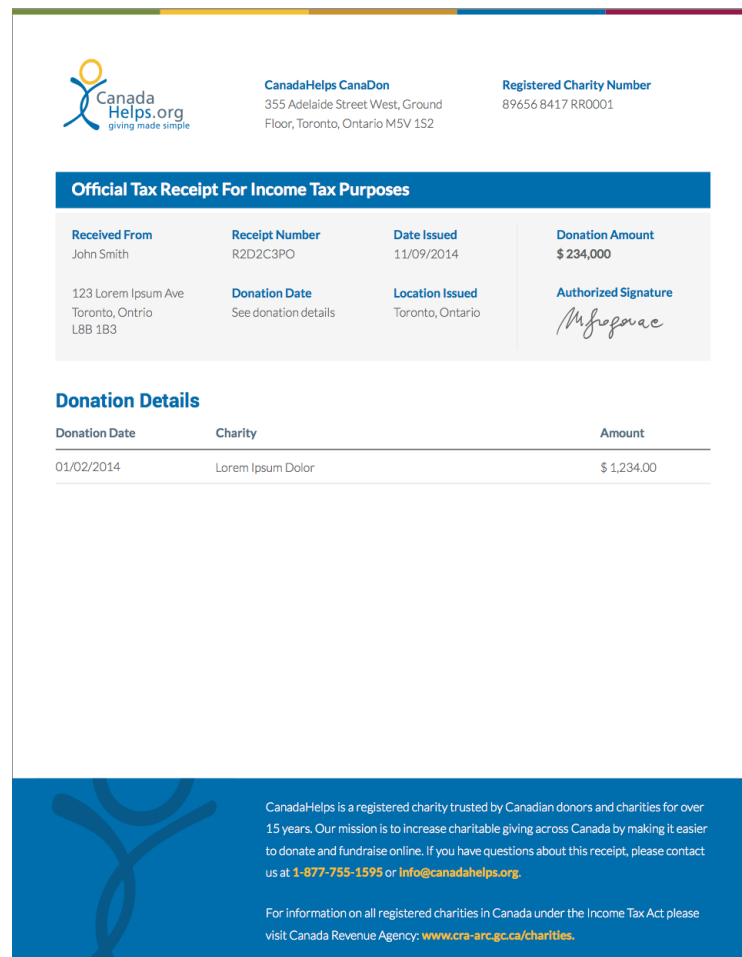
Receipt Valuation


Your charitable tax receipt is based on the closing price on the day the security was received by CanadaHelps' broker

**The tax receipt is NOT for proceeds of sale.*

Treatment of gifts:


- Canadian best practice is to sell immediately and distribute to charity.
- Sale price of securities 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

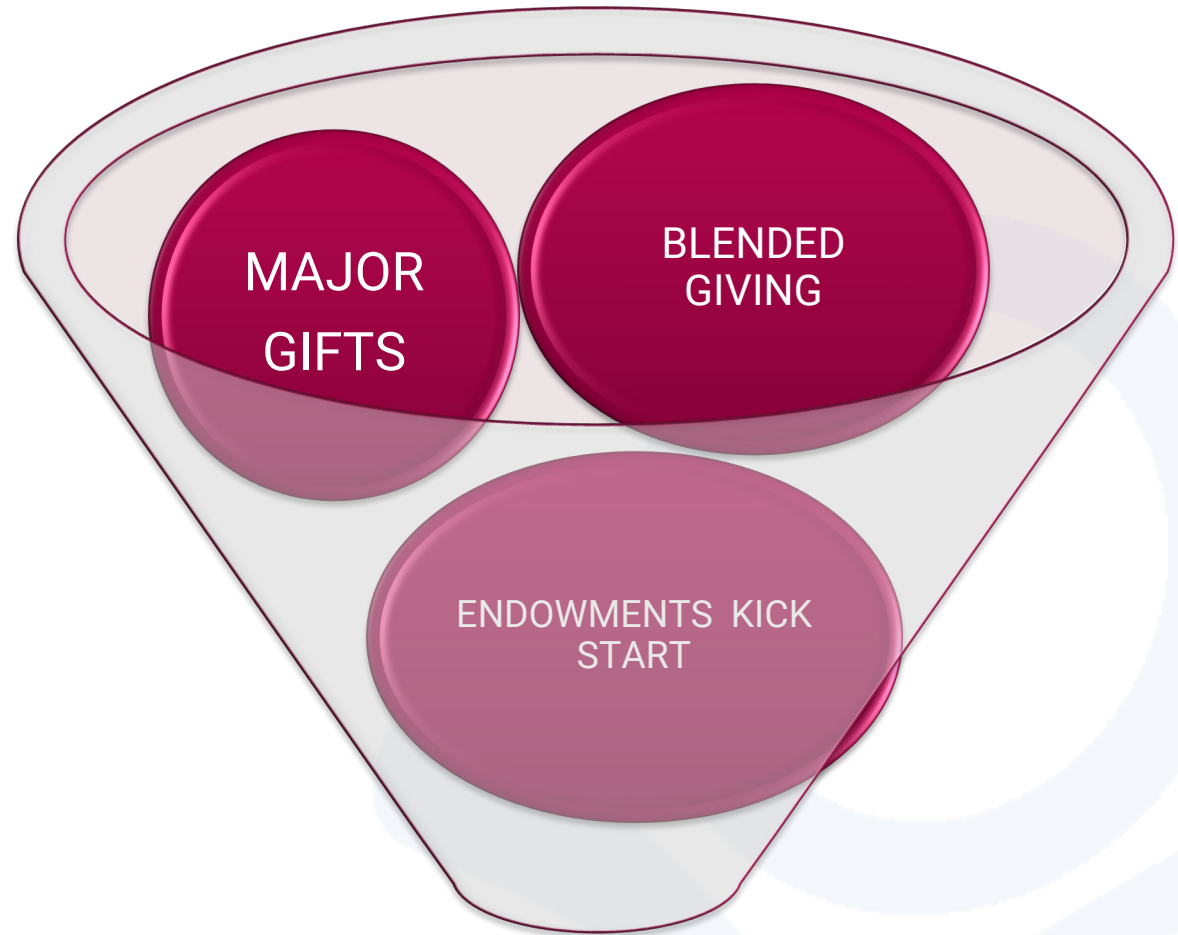
Received From John Smith	Receipt Number R2D2C3PO	Date Issued 11/09/2014	Donation Amount \$ 234,000
123 Lorem Ipsum Ave Toronto, Ontario L8B 1B3	Donation Date See donation details	Location Issued Toronto, Ontario	Authorized Signature 

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**.



SECURITIES

Who are Prospective Donors: Public Securities Donation

Donors of all ages and stages who have appreciated shares in their taxable portfolio

Just ask

- any time a donor says that he/she will be making a gift of cash – ask if he/she has public securities
- Suggest that he/she consider donating the public securities instead in order to take advantage of the tax benefits

How to Market

Ask donors directly

Place articles in newsletters about donors who have made these gifts and how they work

Circulate special articles or buck slips in the fall to donors and others (often think of making donation at year end)

Ensure all fundraisers and board members of your charity know about this opportunity (lunch and learns and board information presentation)

Please remember!

- We have **changed providers** in 2019 so you cannot use last year's form.
- 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.
- Physical securities certificates are a significant challenge for the electronic transfer process – so please call ahead with plenty of time before any deadline you may have for donating.
- If your security or mutual fund takes the form of a physical certificate, the minimum value is \$2,000, since it must first be converted to a "digital format".



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.
- It is **always** recommended that you consult an advisor before making a gift of securities.



Timing

- CanadaHelps cannot guarantee donations will be processed for a 2019 tax receipt after **Monday, December 16th** BUT our team is 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 but we see right away.



Frequently Asked Questions

- Sizing donations : Pledge payments and exact gift amounts
- Designations: What about campaigns or programs?
- How quickly do we get the funds?
- Should donors notify you? Yes and we encourage them to do so!
- Fees:
 - 3% fee applies to donations less than \$10,000;
 - 2.5% fee applies to donations between \$10,000-\$49,999
 - 2.25% fee applies to donations between \$50,000-\$99,999
 - 2% fee applies to donations \$100,000+

Thank you!



Contact us with any questions or to book a demo.

charities@canadahelps.org

www.CanadaHelps.org

1-(877) 755-1595

facebook.com/canadahelps

twitter.com/canadahelps

instagram.com/canadahelps