



GIFT OF SECURITIES

Benefits of a Gift of Stocks

Your generosity can go even further when you choose to give a gift of appreciated securities. By donating publicly traded stocks, bonds, or mutual funds, you not only make an immediate and meaningful difference - you also benefit from valuable tax advantages.

When you donate securities, you avoid paying capital gains tax and receive a charitable tax receipt for the full fair market value of your gift. It's a financially smart and deeply impactful way to support the causes that matter most to you.

Donating a Gift of Securities is simple:

1. **Consult with your financial adviser to identify which investments will provide the greatest philanthropic and financial benefits.**
2. **Complete our gift of stocks form.**
3. **Send the completed form to your broker or investment advisor to start the electronic transfer of securities.**
4. **Email a copy of the completed transfer form to [Alongside Hope](mailto:mswati@alongsidehope.org) for our records.**

	Sell Shares & Donate Cash	Donate Shares Directly
Donation Value	\$30,000	\$30,000
Capital Gain & Tax Owed	\$20,000 gain → \$5,350 tax	\$20,000 gain → \$0 tax
Charitable Tax Credit	\$15,120	\$15,120
Total Tax Savings	\$15,120	\$20,470

*Based on Ontario's top tax rate (53.5%) and donation credit (50.4%).

**This information is not a substitute for consultation with professional tax, accounting or legal advisers. Please consult a professional adviser who can provide insight into your personal financial goals and needs.

Contact Us

If you are interested in learning more about making a gift of securities, please contact Manita Swati, Lead of Planned Giving and Major Giving, at mswati@alongsidehope.org or (437) 833-6358.



Alongside Hope