Gift of Securities

HOW TO MAKE YOUR DONATION

To donate a gift of securities to Muskoka Woods Youth Foundation please follow the following steps:

1. Fill out the second page of this document and forward a copy to the completed transfer form to your broker/investment advisor
2. Please inform Mark Groves at the Foundation once the transfer has been completed, so that we are able to issue the appropriate tax receipt.
3. Please note the value of the donation receipt will be based on the closing price of the security, on the day the securities are received by the Foundation in accordance with Revenue Canada Regulations.

COMPARING A CASH DONATION TO A GIFT OF STOCK

	Sell securities and donate the after-tax proceeds	**Donate securities through Muskoka Woods Youth Foundation**
Original Cost of Securities	$1,000	$1,000
Current Market Value	$5,000	$5,000
Capital Gain	$4,000	$4,000
Tax on Capital Gains	$920	$0
Donation Amount after-tax	$4,080	$5,000
Your Charitable Tax Credit	$1,876.80	$2,300

CHARITABLE REGISTRATION NUMBER

5894 9514 RR0001

CONTACT INFORMATION

Mark Groves, VP of Development
Muskoka Woods Youth Foundation
4585 Hwy 141 Rosseau ON P0C1J0
EMAIL: mark@muskokawoods.com
PHONE: 705-732-4373

Disclaimer: Muskoka Woods Youth Foundation will provide information and assistance to you on this and other ways you can support our work. We recommend that you discuss your plans with a lawyer and/or financial advisor before proceeding with a legacy gift.

Charitable Donation Of Securities In Kind

RAYMOND JAMES®
Raymond James Ltd. is a
Member of CIPF & IIROC

IA #

Account #

Branch

Donor Information

Name | **Address**

City | **Province** | **Postal Code** | **Phone Number**

Donor's Brokerage Information

Financial Institution Name | **Contact Name**

Donor's Account Number: | **Phone Number**

E-mail | **CUID:** | **DTC #:**

Securities To Be Transferred

1. Name of Security: | **Quantity** | **CUSIP/ISIN:**

2. Name of Security: | **Quantity** | **CUSIP/ISIN:**

Charitable Organization & Brokerage Information

Registered Charity | **Charity Registration #**

Charity E-mail | **Charity Broker A/C #**

Name of Receiving Firm | **CUID:** | **DTC #:** | **Phone Number**

Broker Contact Name | **Broker Contact E-mail**

I, _____ , accept the donation of the above referenced securities on behalf of the above noted Charitable Organization.

Authorized Signature

Donor Authorization:

I hereby give authority to my brokerage firm to deliver the above noted securities without restriction as a charitable donation as instructed on this form.

Signature of Donor | **Signature of Donor** | **Date (mm/dd/yyyy)**

To contact Raymond James please direct any questions to:
transfersdonations@raymondjames.ca

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