GIFTS OF PUBLICLY LISTED SECURITIES

The BC Cancer Foundation is the fundraising partner of BC Cancer — together we are driven by a shared vision of building a world free from cancer. Fuel hope for tomorrow for the 80,000 patients facing cancer each year with a gift of securities today.

Why donate publicly listed securities

You can make a difference in the lives of cancer patients and their families by donating publicly listed securities now and/or in your will.

You may be interested in a gift of shares if:

a) You own stocks, bonds or mutual funds that have appreciated in value. Canadians or their estates who directly donate appreciated securities to a registered charity may eliminate capital gains and receive a tax receipt. A corporation can similarly benefit.

b) A charitable tax receipt. In addition, you, your estate or your corporation will receive a charitable tax receipt for the full market value of your securities donation, which you can use to offset other income tax.

The Alternative Minimum Tax (AMT)
The AMT generally applies to high income taxpayers with low taxes payable. If AMT might affect your finances, speak with your advisors today. With planning, AMT paid may be recovered in future years.

How the future of cancer care can be your gift today

Donating publicly listed securities is easy:

1. Our correct legal name must be used in all documents to avoid confusion:
   Legal Name: BC Cancer Foundation
   Registration Number: 11881 8434 RR0001
2. Complete the Securities Transfer Form and ask your broker to initiate the transfer. If you do not have a broker, please send the completed form directly to your institution.
3. Send a copy of the completed form to our broker, National Bank of Canada, at linda.leung@nbc.ca and to us at securities@bccancer.bc.ca
4. BC Cancer Foundation staff will work with you and your advisors to ensure their wishes are carried out. The Foundation will issue a tax receipt (within 7 days of receipt for shares or a few weeks in the case of mutual funds) for the average of the high and low trading prices of the securities on the date they are received in our account..

Here is an example of how it works

Mr. Morrow bought publicly listed securities for $20,000. They now have a fair market value of $100,000.
Mr. Morrow saves $21,400 by donating shares directly to a charity rather than selling them and donating the proceeds. And he contributed $100,000 to the BC Cancer Foundation.

	SELL SHARES & DONATE CASH	DONATE SHARES DIRECTLY
Fair Market Value	**100,000**	**100,000**
Adjusted cost base	($20,000)	($20,000)
Capital gain	$80,000	$80,000
CG Income inclusion	($40,000)	--
Charitable Tax Receipt	$100,000	$100,000
Net receipt	**$60,000**	**$100,000**
Tax Savings at 53.5%*	$32,100	$53,500
Increased tax savings from donating securities		**$21,400**

* The example is for illustrative purposes only. It is based on a combined federal & BC provincial tax rate of 53.5%.

The above information is general in nature and is not intended as legal or tax advice. We can help you support cancer research and care in British Columbia by working with you and your financial and legal professional advisors.

BC Cancer Foundation
Registration Number:
11881 8434 RR0001
bccancerfoundation.com

900-988 West Broadway
Vancouver BC V5Z 1K7
legacy@bccancer.bc.ca
604.877.6040

GIFTS OF PUBLICLY LISTED SECURITIES

Please follow these steps to transfer your shares or mutual fund units to the BC Cancer Foundation in electronic form.

1. Please complete this form with your broker and request they use the form to initiate the transfer. If you do not have a broker, please complete this form and fax it directly to your delivering institution.

2. **a) Copy this form by email or fax**
   linda.leung@nbc.ca to our broker National Bank Financial. 604.685.0682

   b) Copy by email to BC Cancer Foundation at
   securities@bccancer.bc.ca
   or fax to 604.872.3135

3. Upon receipt of the transferred shares (which may take up to two days or a few weeks in the case of mutual funds) and acceptance by BC Cancer Foundation, the Foundation will issue you a tax receipt for the average of the high and low trading prices of the securities on the date that they are received in BC Cancer Foundation's account and in accordance with Canada Revenue Agency regulations and BC Cancer Foundation policy.

4. **Gift Designation**
   Please designate my gift to:

   ☐ highest priority needs
   ☐ specific purpose: ______________________

☐ Please have a BC Cancer Foundation representative contact me to discuss **designating my gift** for a particular purpose or to a particular regional cancer centre.

Thank you for your generosity in donating a gift of publicly listed securities to the BC Cancer Foundation.

BC Cancer Foundation
Registration Number:
11881 8434 RR0001
bccancerfoundation.com

Donor/Transferor Information:

Donor/Transferor: ______________________

Street Address: ______________________
City, Province,
Postal Code: ______________________

Telephone: ______________________

Email: ______________________
Account No. of
Donor/Transferor at
Delivering Institution ______________________

Donor's Broker/Delivering Institution:

Company Name: ______________________

Contact Name: ______________________

Telephone: ______________________

Fax: ______________________

Email: ______________________

I hereby authorize and direct the transfer in kind of the following securities from the above noted account to National Bank Financial (FINS#:T080,CUID#:NBCS) for credit to:
Account # 6XBCX9A: BC Cancer Foundation

Security Description:	CUSIP/ISIN/ SEDOL#	# of shares/ units:

Authorization and Acceptance:

______________________ ________
Signature of donor/client day/month/year

______________________ ________
BC Cancer Foundation signatory day/month/year

Questions? If you have any questions, please telephone the BC Cancer Foundation at 778.653.0045 or toll free 1.888.906.2873.
Charitable Business #11881 8434 RR0001

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