Kinvia
Previously known as
Canadian Feed The Children

901-2 Lansing Square, Toronto, ON M2J 4P8 | Tel: 1.800.387.1221 416.757.1220
kinvia.ca | contact@kinvia.ca | Charitable Registration: 11883 0983 RR0001

FACT SHEET

Gifts of Publicly Traded Securities & Mutual Funds

A few years ago, the Federal government eliminated the capital gains tax on gifts of Publicly Traded Securities and Mutual Funds. If you own stocks or mutual funds that have grown in value, you will face a tax bill when you sell them. By donating them directly to Kinvia you can eliminate your tax bill and make a significant gift at the same time. This giving option is attractive if you have appreciated investments and wish to make a donation from savings rather than cash flow.

Why is a gift of Publicly Traded Securities & Mutual Funds beneficial?

Simple & Convenient – Shares are easy to transfer. Your broker transfers the shares from your account directly to Kinvia's brokerage account. The date of your donation will be the date the shares are received in our brokerage account. Your gift will not qualify for the capital gains tax elimination if your shares are sold, and the cash then gifted to a charity.

Tax Advantages – By donating your appreciated stock shares or mutual funds directly to Canadian Feed The Children you will receive two kinds of tax savings: a tax credit in the form of a charitable tax receipt and the elimination of the capital gains owed on the disposition of the shares, thereby significantly reducing taxes and may increase inheritances to your loved ones.

Reduced Brokerage Fees – Many brokerage houses forego fees for charitable transactions. Ask your broker whether this applies.

Recognition – Your gift can be honoured during your lifetime.

Opportunity – Your gift is an opportunity to reduce the impact of poverty on children and leave a lasting legacy.

How does it work?

The donation must be made "in-kind" to qualify for the capital gains tax exemption, so the securities must be transferred directly into Kinvia's brokerage account. A donation receipt is issued for the fair market value of the security on the date of transfer.

Please Seek Expert Advice:
Kinvia strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and your planned gift is tailored to your circumstances. For further information and sample Will bequest clauses, please contact Fawad Iqbal – *Senior Manager Partnerships*, at fiqbal@kinvia.ca

Guidelines for Transferring Assets*
Gifts of Publicly Traded Securities & Mutual Funds

Brokerage Accounts

The easiest and safest method of transfer exists if your shares are in a brokerage account. Simply instruct your broker to transfer the shares directly from your brokerage account into Kinvia's brokerage account.

Share Certificates

If you own share certificates, you may donate an endorsed certificate with your signature guaranteed by the bank or your broker. For an unendorsed certificate, please attach a signed Stock Power (or security power form) with the signature guaranteed. Certificates may be delivered by courier to Kinvia if due precaution is observed, that is, the unendorsed certificates and the stock power are delivered separately. Re-registering the share certificates in the name of Kinvia is **not** recommended. As re-registration can take more than two weeks, the value of the shares can change during this time.

Transferring Mutual Funds

To transfer mutual fund shares, the donor must send a Letter of Instruction to the fund company (e.g. AGF or McKenzie Financial, etc.) You must sign documents provided by the fund company. A letter of instruction states:

"I request that ________________________________ immediately transfer ______ shares from my account # ________________________ into the name of Kinvia. Do not sell or redeem this donation from my account. After Kinvia receives confirmation that the shares are in its account, it may authorize the sale of the shares to use to further its mission."

Kinvia is pleased to provide you with a **Securities Donation Transfer Intent Form** to complete the transaction. Please see the following pages or contact our office to have this form explained in detail to you.

***Kinvia Gift of Securities donation form should accompany your Letter of Instruction to your financial institution.**

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GIFT OF PUBLICLY TRADED SECURITIES
Transfer Intent Form

STEP 1: Prior to securities transfer, please fax or email this form to:

Fawad Iqbal
Senior Manager – Partnerships
Kinvia
901-2 Lansing Square | Toronto | ON | M2J 4P8
Phone: 416-757-1220 ext 245 | **Cell:**
416-558-2871 **Toll Free:** 1-800-387-1220 | **Fax:**
416-757-3318 **E-mail:** Fiqbal@kinvia.ca

STEP 2: Donor Information – (Name of donor for charitable receipting)

Name: ______________________________

Address: ______________________________

City: ______________ Province: __________ Postal Code: __________

Phone: ______________ Email: ______________

Gifts of $1,000 or more are acknowledged in our Annual Report.
Please indicate if you prefer to remain anonymous. ☐

STEP 3: Notification of Intent

This letter will confirm my intention to donate the following securities to Kinvia without restriction and which can be sold by Kinvia at any time it considers appropriate.

Name of shares: ______________________________

Number of shares: ______________________________

Account Number: ______________________________

Authorizing Signature: ______________________ Date: ______________

STEP 4: Your Broker/Delivering Custodian Information:

Name of Firm: ____

Broker's Name: ____

Phone: ______________________ Email: ______________________________

STEP 5: Kinvia's Broker Information

To electronically transfer securities, please provide your broker with the following:

Name of Account:	Kinvia
Institution:	CIBC Wood Gundy
Rep Code:	CT9
Transit/Dealer Code:	9280
Account Number:	426-50056-13
Broker Contact Name:	Rory Tufford
Email:	rory.tufford@cibc.ca
Phone:	(416)594-8949
Toll Free:	1-800-387-1865
Fax:	(416)369-8987
For Canadian $ Stocks:	DCS CUID # WGDB
For US $ Stocks:	DTC # 5030
Charitable Registration #:	11883 0983 RR0001

You will receive a Gift-in-Kind charitable tax receipt through the mail recognizing the value of your donation.

***Please be advised that the value of the donation receipt will be based on the closing price of the securities on the day that they are received into our account in accordance with our policy and Canada Revenue Agency (CRA) regulations.**

Please Seek Expert Advice:
Kinvia strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and your planned gift is tailored to your circumstances. For further information and sample Will bequest clauses, please contact Fawad Iqbal – *Senior Manager Partnerships*, at fiqbal@kinvia.ca

Gift Notification

Notifying us of your gift allows us to thank you personally, plan for future programs and projects that impact children around the world.

Thank you for assisting us in our quest to create a world in which children thrive, free from poverty by considering making a planned gift to Kinvia.
We cannot achieve this vision without you!

Name: ______________________________

Address: ______________________________

City: ______________________ Province: __________ Postal Code: ______________

Date of Birth: ______________________ Telephone: ______________________

Email: ______________________________

Type of Gift

Yes, *I have made provision for Kinvia and you may note my file as follows:*

☐ Outright bequest in my Will $ ______________________
☐ % of my estate in my Will __________ %
☐ Trust under my Will with Kinvia as the final beneficiary
☐ Publicly Traded Securities and/or Mutual Funds approx. $ ______________
☐ Registered Assets - RRSP or RRIF approx. $ ______________
☐ Life Insurance Policy approx. $ ______________
☐ Other ______________________

Recognition

☐ **Yes,** I would like to be recognized for my gift, allowing other donors to understand how making such a gift can help children throughout the world.

☐ **No thank you,** I would not like any type of recognition, and I would prefer my gift to remain private.

Date: ______________________ Signature: ______________________

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