



GIFTS OF SECURITIES OVERVIEW

ADVANTAGES OF DONATING SECURITIES

Making a gift of securities to Camp Oochigeas is a worthwhile alternative to donating cash. The elimination of capital gains tax on gifts of appreciated securities provides donors with substantial tax incentives. By donating appreciated stocks, mutual funds, stock options or flow through shares to Camp Ooch, donors are exempted from this tax and receive a tax receipt for the fair market value of the securities. The following example illustrates the benefits:

	DONATE SHARES DIRECTLY	SELL SHARES AND DONATE PROCEEDS
Current Value of Shares (A)	\$10,000	\$10,000
Amount Paid for Shares (B)	\$5,000	\$5,000
Capital Gains (A - B = C)	\$5,000	\$5,000
Capital Gain Inclusion Rate (D)	0%	50%
Taxable Capital Gain (C x D = E)	\$0	\$2,500
Tax on E (assuming 49.5% marginal rate)	\$0	\$1,238
Donation Tax Credit (A x 46.4%)	\$4,640	\$4,640
Net Tax Savings (F)	\$4,640	\$3,403
Net After-Tax Cost of Donation (A - F)	\$5,360	\$6,598

*Assumes gifts made in Ontario at marginal tax rate of 46.4%. Rates are subject to change and vary by province.

HOW TO DONATE IN TWO EASY STEPS

1. Complete the attached Gift of Securities Form and submit to your broker to initiate the transfer.
2. Send a copy of the completed form to Peter Weizenbluth, Director, Finance & Corporate Services at Camp Oochigeas.

Please Note: Securities are transferred anonymously into our account. Notifying us of this transfer will ensure you receive your official tax receipt. Unexpected and/or unidentifiable transfers may cause a delay in gift recognition and receipting.

Peter Weizenbluth
Director, Finance & Corporate Services
Camp Oochigeas
464 Bathurst Street, Toronto, ON M5T 2S6
Phone: 416-961-6624 ext. 254 / Fax: 416-961-2267 / email: pweizenbluth@ooch.org



GIFTS OF SECURITIES FORM

Please fax your completed form to 416-961-2267 or scan and email form to pweizenbluth@ooch.org or print and return by mail to mailing address located at the bottom of this document.

I / We would like to make a contribution of \$_____ in gifts of securities to Camp Oochigeas

DONOR INFORMATION

Name of Donor: _____

Mailing Address: _____ **City:** _____

Province: _____ **Postal Code:** _____

Phone # (Home): _____ **Phone # (Bus):** _____

Email: _____

Employer: _____ **Employee Title:** _____

Recognition Name: *(Name to appear on donor listings, if different from above)* _____

I wish to remain anonymous.

DONOR BROKER INFORMATION

Delivering Institution: _____

Account #: _____ **Account Name:** _____

Contact Name: _____ **Phone # (Bus):** _____

Contact Email: _____ **Fax #:** _____

SECURITIES TO BE DONATED

Name & Type of Security: _____

of Units or Shares: _____ **CUSIP:** _____

Please be advised that the value of the donation will be based on the closing price of the security, on the day the securities are received in Camp Oochigeas' brokerage account.

CAMP OOOCHIGEAS BROKER INFORMATION

Name of Firm: BMO Nesbitt Burns **Account #:** 41030659-10

Contact Name: Fraser Chapman **CUID:** NTDT **DTC:** 5043

Mailing Address: 40th Floor, P.O. Box 150 – 1 First Canadian Place, Toronto, ON M5X 1H3

Phone #: 416-359-4427 **Fax #:** 416-359-7240

DONOR RELEASE

I authorize the transfer of these securities to Camp Oochigeas. Camp Oochigeas may contact my broker for the purpose of this transfer.

Signature: _____ **Today's Date:** _____

THANK YOU FOR YOUR SUPPORT!

FOR OFFICE USE ONLY	RE #:	FUND:
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An official tax receipt will be issued for your gift. Camp Oochigeas respects your privacy. Our staff will always ensure to hold all donor information in strict confidence in accordance with all privacy legislations. Your name will be taken off any and all internal lists if you provide written request. If you have any questions about our Privacy Policy, your gift and/or our programs please contact Peter Weizenbluth, Director, Finance & Corporate Services at Camp Oochigeas at 416-961-6624 ext. 254 or by email at pweizenbluth@ooch.org .



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To donate your gift of stock to Camp Oochigeas please follow these three easy steps:

STEP 1

Complete all sections of the “Gift of Securities” Form.

Please Note: For privacy reasons, your broker cannot disclose your name to us, so please complete the Donor Information section, including your daytime phone number with your area code in case we need to speak with you. Your advisor will provide you with an identification number which will act as a transaction number in case the transfer needs to be tracked.

STEP 2

Fax, email or mail Camp Oochigeas the completed **Gift of Securities Form** to your broker or advisor who is responsible for initiating the transfer.

STEP 3

In order to facilitate a transfer of securities and to ensure you receive your official tax receipt, please return a copy of the completed form to Peter Weizenbluth, Director, Finance & Corporate Services at Camp Oochigeas.

Please Note: This step is very important as securities are transferred anonymously into our account. Notifying us of this transfer will ensure you receive your official tax receipt. Unexpected and/or unidentifiable transfers may cause a delay in gift recognition and receipting.

Forms can be faxed to 416-961-2267 or scanned and emailed to pweizenbluth@ooch.org. They can also be sent by mail to:

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Phone Number: 416-961-6624 ext. 254
Email: pweizenbluth@ooch.org

An official tax receipt will be issued for your gift. Camp Oochigeas respects your privacy. Our staff will always ensure to hold all donor information in strict confidence in accordance with all privacy legislations. Your name will be taken off any and all internal lists if you provide written request. If you have any questions about our Privacy Policy, your gift and/or our programs please contact Peter Weizenbluth, Director, Finance & Corporate Services at Camp Oochigeas at 416-961-6624 ext. 254 or by email at pweizenbluth@ooch.org.