

Gift of Securities

Donations of publicly listed securities to United Way are exempt from all capital gains taxation.

By donating publicly traded shares to United Way, you will not pay the capital gains tax normally associated with such a sale. This means that you receive a tax receipt for the full value of the shares, but are NOT taxed on any gain. Donors of securities therefore do not need to take any capital gain into income.

Your charitable receipt will reflect the closing price of the shares on the date they are received in United Way's brokerage account.

Note: Actual shares must be transferred to United Way. If shares are sold and then the proceeds donated to United Way, the enhanced tax benefits do not apply.

To assist donors, United Way has made making a gift of securities a simple two-step process.

1. Download and complete the Gifts of Securities form.
2. Your broker will transfer your securities to United Way's brokerage account and advise the United Way of the transaction.

Contact the United Way office, 613-542-2674 or email uway@unitedwaykfla.ca for more information.

Why United Way

The United Way is the largest non-government funder of social services in our community. Your gift to the United Way of KFL&A will impact many lives through dozens of organizations and programs. We continuously monitor these programs and services to ensure that your investment in our community is managed responsibly and helps those most in need.

We're here to help

We'd be pleased to meet with you or your professional advisor to discuss your gift and how you can make a lasting impact for generations to come.

For more information please call the United Way at 613-542-2674.