

SIMPLE PROCESS

1. Complete the Notification of Securities Transfer and send it by email to the Centre for ADHD Awareness, Canada to Juanita Beaudry: juanita.beaudry@caddac.ca

2. Instruct your broker to transfer your securities to the Centre for ADHD Awareness, Canada's Brokerage account. **Please do not transfer securities without first forwarding this form to the Centre for ADHD Awareness, Canada.**

Bank of Montreal

Account #: 4253903811 **CUID:** NTD T **DTC #:** 5043 **Dealer:** 9185 **Broker Code:** HJ7

3. A charitable tax receipt will be issued for the closing price of the securities on the day of the transfer to the Centre for ADHD Awareness, Canada.

4. Eligibility of a tax receipt for the current year requires that securities must be in the Centre for ADHD Awareness, Canada's brokerage account by 5 p.m. on December 31st of that year.

CLEAR RESULTS

If you sell a security, you pay tax on 50% of the capital gain.

However, when you donate a gift of securities to CADDAC, **the taxable capital gain is completely eliminated.**

AND

You receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day CADDAC receives the security.

Example of the tax benefit of donating Gifts of Securities to CADDAC		
	Donor sells securities and gives cash	Donor gives securities
Current value of Shares	\$10,000	\$10,000
Original cost of Shares	\$5,000	\$5,000
Capital Gains	\$5,000	\$5,000
Taxable portion of Capital Gains (50%)	\$2,500	\$0
Capital Gains Tax*	\$1,075	\$0
Receiptable Donation for Gift	\$10,000	\$10,000
Total Tax Credit	\$3,976	\$3,976
Net Tax Savings**	\$2,901	\$3,976
<small>*The marginal tax rate for each province and individual is different. **This is an example of provincial and federal combined rate. (please consult with your tax advisor) These figures are for illustration purposes. This information is general in nature and does not constitute legal or financial advice. CADDAC recommends that before making any gift of securities of any size, that a donor consults with their professional financial advisor for the tax, financial, and/or estate planning implications. Individuals' circumstances differ - please seek expert advice to discover the advantage for donating securities.</small>		

Your gift is important to us. Please complete this form and send to juanita.beaudry@caddac.ca

Please contact your broker to arrange the share transfer to:

Bank of Montreal

Account #: 4253903811 **CUID:** NTDT **DTC #:** 5043 **Dealer:** 9185 **Broker Code:** HJ7

YOUR BROKER DETAILS

Broker Name

Financial Institution

Broker Phone Number

Broker Email

GIFT DETAILS

of shares

shares of _____
Name of Security

of shares

shares of _____
Name of Security

DONOR DETAILS

Donor Name

Donor Address

City

Province

Postal Code

Phone Number

Email

Signature

Date

A charitable tax receipt will be issued electronically if an email address is provided above.

I would prefer to receive my tax receipt via mail

My gift may be publicly recognized by the Centre for ADHD Awareness, Canada Yes No

I would like my name to appear as: _____

The Centre for ADHD Awareness, Canada Charitable Registration Number: 828460329RR00011