



Lifewater Canada

Donation of Securities

457 Heather Cres
Thunder Bay, ON, P7E 5L1
Phone: (807) 622-4848
Email : info@lifewater.ca
Charity #: 885420737RR0001

On behalf of all the children, men and women without safe drinking water, we thank you for choosing to make a gift of securities to Lifewater Canada. Please help us properly thank you by letting us know what you are donating and how you want the funds used. Please contact Lifewater Canada President Lynda Gehrels at lifewatercanada@gmail.com or 807-622-4848.

Why Donate Securities?

This is an excellent giving option because there are no capital gains on securities donated directly to charities. Donating securities means Lifewater receives more cash and you get a bigger tax receipt (worth 40 - 53.5%)!

For example, if the stock you bought for \$1,000 is now worth \$5,000, you have a capital gain of \$4,000 of which \$2,000 is taxable income. Depending on your tax bracket, giving the stock so you are exempt can save you from \$200 to \$1,060 in income tax. If you are in the 45% tax bracket and sold the stocks, you pay a capital gain tax of \$900, your net donation is \$4,100 and your tax receipt would save you \$1,845. Donating stock instead of net proceeds means your donation would be \$5,000 and your tax receipt would save you \$2,250 . . . *definitely a win-win situation!*

How to Donate Securities

Securities or stock donations are managed by our partner, Link Charity. To donate securities or stocks, follow these simple three-step instructions:

- 1) Complete the attached one-page **Security Transfer Form** (page 3 below). Link Charity has nine brokerage accounts. Please contact Link (see #4) to select the most appropriate brokerage, account number, contact agent, and phone number to specify on your Security Transfer Form.
- 2) Send the completed Security Transfer Form to your broker. Email a copy to Link Charity for its records (see #4)
- 3) Finally, complete and email to Link Charity the attached **Letter of Direction** (page 2 below), designating the gift to Lifewater Canada.
- 4) If you have any questions or need to transfer actual paper certificates, please contact Robert Ennema at Link Charity:

Office: 800-387-8146 or info@linkcharity.ca
Personal: 647-222-3704 or rob@linkcharity.ca

Thanks so much!
Lynda Gehrels,
President
Lifewater.ca



101-334 Donlands Ave. Toronto, ON M4J 3R9
 1-800-387-8146 Fax: 416-465-6367
www.linkcharity.ca info@linkcharity.ca

DISTRIBUTION OF PROCEEDS LETTER OF DIRECTON

I am transferring the following securities to Link Charity Canada Inc.:

of shares _____ *Name of security* _____

Sending Brokerage: _____ Receiving Brokerage: _____

Please sell/redeem at: Market Value A price not less than \$_____/share

Link Charity, please donate the proceeds to the charities in the amounts/percentages listed below:
 (if giving dollar amounts, please designate one charity to receive "the balance")

Amount (\$ or %)	Charity Name and Address	Designation or Restriction (if any)	Contact Person (if any)

If more charities, please attach another page with a full listing of amounts/percentages

Applicant:

Family Name		Given Name	
Address			
City	Province	Postal Code	
Phone	Fax	Email	

Signature(s):

_____ Date: _____

This page should be sent to Link Charity only – *do not send it to your brokerage.*

*Link Charity’s fee is \$25 for the first charitable beneficiary and \$10 for each additional beneficiary of the same transaction



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DIRECT TRANSFER OF STOCK OR MUTUAL FUNDS

I/We hereby AUTHORIZE:

Name of Donor's Brokerage Firm:		Contact Name:
Address		
City	Province	Postal Code
Phone	Fax	E-mail

To Transfer from my/our Account Number: _____, the following shares in-kind:

Quantity:	Name of Security:	Symbol, if known:

To the following account in the name of Link Charity Canada Inc.:

Brokerage: _____ Account Number: _____

Contact: _____ Contact Phone: _____

Please process this transfer immediately. This transfer is a charitable donation.

Donor(s) Information:

Family Name		Given Name(s)
Address		
City	Province	Postal Code
Phone	Fax	Email

Signatures (Brokerage will likely require a bank guarantee stamp):

Donor

Co-Donor

Date:



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Instructions:

1. Send the original copy of the transfer form to your broker. Link Charity would appreciate receiving a copy of the form for its records.
2. When a transfer is initiated, Link Charity should receive an accompanying Letter of Direction containing any selling restrictions or gift designations. A sample Letter of Direction is available on the Securities section of www.linkcharity.ca. Please send Link Charity the original; it is not necessary to provide the letter of direction to your broker.
3. Gifts received will be sold in accordance with the donor's instructions and receipted according to Link Charity Canada Inc.'s receipting policy. For information on this policy, please contact Link Charity.
4. Link Charity Canada Inc. requests permission to charge a small fee to recover costs incurred as a result of the transfer and sale. From the gross proceeds of the sale, Link Charity deducts any selling commissions (charged by the receiving brokerage) as well as a Link Charity cheque fee of \$25 for the first beneficiary of a transaction and \$10 for each additional beneficiary.