



**CENTRE FOR  
ALL ABILITIES**  
A PLACE TO WORK, LEARN & PLAY  
A Project of Calgary Rotary Challenger Park

## Save On Your Taxes While Helping CRCP

### Gifts of Publicly Traded Securities and Mutual Funds

You are no longer subject to capital gains tax when you donate publicly traded securities to qualified charities. You are also entitled to receive a charitable tax receipt for the fair market value of the securities donated. As a result, donating securities to Calgary Rotary Challenger Park Society may produce a greater tax benefit than selling the shares first, and then donating the cash. The following exchangeable shares are eligible:

- Shares, rights, bonds or debentures listed on a designated stock exchange
- Shares of a Canadian public mutual fund corporation
- Units of a widely held Canadian mutual fund trust
- An interest in a segregated (insurance) fund trust
- A bond or debenture issued or guaranteed by the Government of Canada or one of the provinces

Benefits to you:

- *Tax Advantages* — By donating your appreciated securities or mutual funds directly to Calgary Rotary Challenger Park Society you can eliminate your capital gains tax bill.
- *Reduced Brokerage Fees* — Many brokerage houses forego fees for charitable transactions.
- *Simple and Convenient* — Securities are easy to transfer. Your broker transfers the shares from your account to Youth Singers' brokerage account.
- *Opportunity* — An opportunity to make a greater difference in your own community.
- *Recognition* — Your gift can be honoured during your lifetime.

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### Information for Donating Publicly Traded Securities and Mutual Funds

Our Account is with **RBC Dominion Securities Inc.**  
**333 -7th Avenue S.W., Dome Tower, Suite 1400,**  
**Calgary, Alberta T2P 2Z1**

Telephone number: **403.299.7136**

Facsimile: **403.835.5167**

Toll-free: **1.800.310.6484**

Our Advisor is Sean Baylis: [sean.baylis@rbc.com](mailto:sean.baylis@rbc.com)

Deposit proceeds from the share donation to Calgary Rotary Challenger Park Society's Account: **#701-86085-18**

DTC #: **5002**

Dealer #: **9190**

Advisor's Name: **Sean Baylis**

FINS: **T002**

CUID #: **DOMA**

Euroclear: **90065**

You may send the physical security to Sean Baylis at the address above in Calgary or for the speediest delivery and preferred method, you can transfer the shares electronically to RBC Dominion Securities Inc.

Please include the Investment Advisor information listed above in any correspondence.



## Electronic Transfer Instructions

1. For any questions related to securities, please contact James M. Zachowski, Executive Director: **403.250.2707** or via E-mail: [jzackowski@challengerpark.com](mailto:jzackowski@challengerpark.com)
2. Download and complete the Transfer Form from <http://www.challengerpark.com>
3. Sign it and fax it to the CRCP Office **403.250.2055\*\*** or scan and email to [jzackowski@challengerpark.com](mailto:jzackowski@challengerpark.com)

Once we have both the signed Transfer Form and your shares have been transferred to our account, we will advise you, in writing, of the value. \*\*\*You will receive a charitable tax receipt for that same amount from the Calgary Rotary Challenger Park Society.

First Name	Initial(s)	Last Name
Home Address		
City/Province	Postal Code	
Home Phone	E-Mail	
Business Address	Business E-Mail	
Business Phone	Business Fax	

Financial Advisor	Firm's Name	Advisor's Phone
Security Name	Exchange Name	# of Transferred Shares
Approx. Value of Each Share	Approx. Total Value of Donation	CUSIP #
Delivering Institution	Donor Account #	

In order to receive a charitable receipt for the current year, Calgary Rotary Challenger Park Society requires the signed **Transfer Form** as well as the actual shares to be transferred to the respective account, or physically received no later than close of markets on December 31st of this year. Ideally, this should be arranged 2 weeks in advance of the year end to ensure all instructions are completed as planned. Please provide a copy of this form to your investment advisor.

Calgary Rotary Challenger Park Society (89024 3520 RR0001) is a registered Canadian Charitable Organization.

**It is my/our understanding that the above securities will be offered for sale by Calgary Rotary Challenger Park Society as soon as the transfer is complete, and the net sale proceeds will be credited to Calgary Rotary Challenger Park Society.**

Signature of Donor	Date	Calgary Rotary Challenger Park Society 3688 - 48th Avenue N.E. Calgary, AB T3J 5C8 T: 403.250.2707 F: 403.250.2055 E: <a href="mailto:jzackowski@challengerpark.com">jzackowski@challengerpark.com</a>
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\*Any gift planning should be done in consultation with your financial or tax advisor.

\*\*Restrictions apply

\*\*\*Generally this will be based on the closing price on the day we accept the donation, but exceptions may apply.