



Donating Securities

Gift of Securities

Donating publicly traded securities or mutual funds allows you to increase your impact, helping to bring real change to the lives of animals around the world, to stop animal exploitation, cruelty and suffering.

By donating securities directly to a World Animal Protection as opposed to selling them and donating the proceeds, the capital gains tax is eliminated. A gift of securities, therefore, benefits you more than giving cash, and allows you to make a larger gift for less, while increasing your impact for animals around the world.

The Benefits

- You can donate the securities now or as part of your estate planning
- You may choose to donate a portion of your stock and retain the remainder for personal use
- You receive a charitable tax receipt for your donation
- You pay no tax on the capital gains that have accumulated on the securities
- Easy and simple to do

If you are thinking about transferring assets that have appreciated, you should seek expert advice from a tax specialist, your broker or qualified financial adviser.

Gift Example

	Selling Securities for cash. Donating after- tax proceeds	Donate securities directly to World Animal Protection
Original Purchase Cost	\$1,000.00	\$1,000.00
Current Market Value	\$5,000.00	\$5,000.00
Capital Gains	\$4,000.00	\$4,000.00
Tax on Capital Gains	\$920.00 ¹	\$0.00
Donation Amount After Tax	\$4,080.00 ²	\$5,000.00
Your Charitable Tax Credit	\$1,876.00 ¹	\$2,300.00 ¹

1. This assumes a 46% marginal tax rate. For calculating capital gains tax, this rate is applied to 50% of the capital gain.
2. \$4,080.00 represents the full value of \$5,000.00 minus estimated tax of \$920.00.
Scenario for illustrative purposes only.

Next Steps

1. Speak to your financial advisor to decide what investments make the most financial and philanthropic impact.
2. Ask your broker to transfer your securities to World Animal Protection's broker by completing the securities form found on our main securities web page.
3. World Animal Protection will sell the stock once it has been received from your broker.
4. You will receive a tax receipt for the closing value of the stock on the day World Animal Protection's broker receives them.

For more information on gifts of securities, please contact our Donor Relations Manager at: 416 369 0044 x122 or mylegacy@worldanimalprotection.ca.