

# WE CAN PLAN ON IT TOGETHER

Gifts of shares for a better tomorrow

Thank you for including Trillium Health Partners in your estate plans.

Did you know that when you sell shares—even to donate the proceeds to charity—a significant portion will be taxed? This reduces the impact of your planned gift because 50 percent of the shares' appreciated value (the capital gain) is taxable.

When you transfer ownership of your shares to Trillium Health Partners Foundation, no capital gains tax is paid. Because Trillium Health Partners Foundation liquidates donor-transferred shares, the full value of your health care investment goes to our hospital—at a reduced net cost to you and your estate.

## Charting your impact on transformative care close to home:

### SELL SHARES AND DONATE

**Current value, \$50,000**  
 Amount paid, \$10,000  
 Capital gains, \$40,000 (current value minus purchase price)  
 Capital gain tax, \$10,000 ( $\$40,000 \times 50\%$  taxable gains  $\times 50\%$ )  
 Tax credit, \$25,000 ( $\$50,000$  donation  $\times 50\%$ )  
 Total tax savings, \$15,000 ( $\$25,000 - \$10,000$ )  
**Net cost of donation, \$35,000** ( $\$50,000 - \$15,000$  in saving)

### DIRECTLY DONATE SHARES

**Current value, \$50,000**  
 Amount paid, \$10,000  
 Capital gains, \$40,000 (current value minus purchase price)  
 Capital gain tax, \$0 (no capital gains tax paid on donated shares)  
 Tax credit, \$25,000 ( $\$50,000$  donation  $\times 50\%$ )  
 Total tax savings, \$35,000 ( $\$25,000 + \$10,000$ , tax not paid)  
**Net cost of donation, \$15,000** ( $\$50,000 - \$35,000$  in saving)

**When you bequest a gift of shares to Trillium Health Partners Foundation to liquidate, there is no tax paid on the capital gain.**

# THREE STEPS TO BETTER HEALTH FOR A BETTER TOMORROW

---

1.

## Download our Gift of Shares form

Our form contains easy-to-follow instructions: [trilliumgiving.ca/shares](http://trilliumgiving.ca/shares)

2.

## Complete, sign, and send to your broker

You may fax, mail, or email our form to your financial broker to authorize the transfer of your shares to Trillium Health Partners Foundation

3.

## Notify Trillium Health Partners Foundation

Finally, we ask that you send a signed copy of your form to Anne Tatoff, Vice President of Corporate Services, at [anne.tatoff@thp.ca](mailto:anne.tatoff@thp.ca).

---

## Advantages of Giving Gifts of Shares

No tax paid on the capital gain.

Official tax receipt for the total appreciated amount, reducing the net cost to you and your estate.

Comfort knowing that your donation's maximum value will enable exceptional patient care now and tomorrow.

---

### Do you have questions? We can help

To discuss a gift of shares made through your estate or a gift in your will, please contact 905.848.7575 or [foundation@thp.ca](mailto:foundation@thp.ca).

### Our CRA-registered charity number

Trillium Health Partners Foundation—our legal name—is a registered charity with the Canada Revenue Agency (registration number: 1192 45678 RR0001).