



WAYS TO GIVE

DONATING SECURITIES

A Step By Step Guide To Donating Securities and Mutual Funds

Thank you for considering a gift of securities or mutual funds from our investment portfolio. We use an online service called CanadaHelps to facilitate the donation of securities and funds. Making a contribution using existing holdings is a wonderful way to support Whistler Community Services Society and provides tax advantages to you, the donor, at the same time. By donating securities directly as opposed to selling them and donating the proceeds, the capital gains tax can be eliminated on the sale of the equity or fund. This means more money for WCSS and a greater charitable tax credit for you. Please consult your investment advisor and tax accountant for more details.

Follow these steps to donate securities or mutual funds to WCSS:

- 1) Navigate to this website: <https://www.canadahelps.org/en/charities/whistler-community-services-society/>
- 2) Click the “Donate Securities” button on the right side of the page under “Donate To This Charity”
- 3) This will direct you to a fillable form, choose donate securities OR donate mutual funds.
- 4) Fill out the online securities donation form by December 17th to ensure a tax receipt is issued for the same year you are donating. Upon completion, you will receive an email confirming all the details of your pledge. Canada Helps will provide you with the tax receipt.
- 5) Complete the provided Letter of Direction form and send it to your financial advisor or investment firm. This authorizes the transfer of shares to CanadaHelps.
- 6) Once shares are sold, CanadaHelps will send you a confirmation email with your charitable tax receipt and disburse the proceeds to the charities you selected.
- 7) Process complete.

Thank you for considering a gift of securities or mutual funds, your generosity is greatly appreciated.

