

Gift of shares

A gift of shares is a tax-effective option that allows you to make a larger donation than if you were to make a cash donation of equal value. It's a strategic way to support a cause that's close to your heart.

Eligible securities

Eligible securities include stocks, bonds, mutual fund units and any other eligible security listed on a Canadian, U.S. or international stock exchange.

Advantages

- The procedure is fast and simple: it can all be done electronically in just a few days.
- It's far more tax-effective to donate securities directly than sell them then donate the proceeds, since the capital gains are tax-exempt.
- A gift of securities is ideal in a situation where shares have increased considerably in value since the time they were acquired.
- You will receive a tax receipt equivalent to the market value of your shares at the time the markets close on the day they are deposited into the Foundation's account.
- You may also include a gift of securities in your will if you want to include the Foundation in your legacy.
- If you own a holding company, it might be more advantageous to donate shares through the company.

Next steps

1

Download and complete the Donor Confirmation Form – Publicly Traded Securities, available on the Foundation's website: givefortheheart.org (in the "Donate" section).

2

Send the completed form to your broker and authorize them to make the transfer.

3

Inform the Foundation of your gift (so we can accept the transfer) by sending your completed form to **Catherine St-André**, Senior Advisor, Major and Planned Gifts, **by email** at catherine.st-andre@icm-mhi.org or by fax at 514 376-5400.

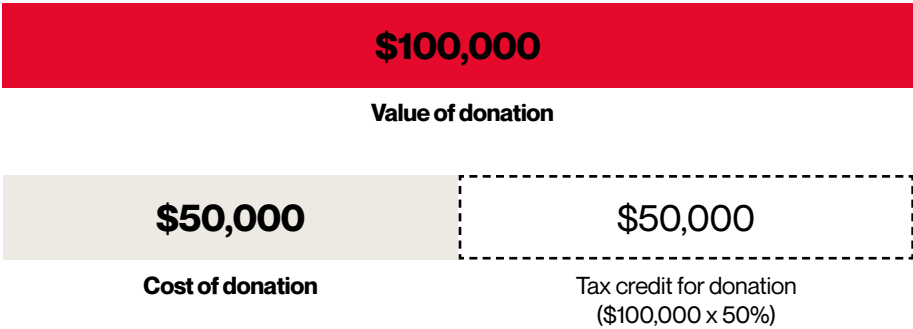
4

Once we can confirm that the securities have been received, the Foundation will notify you of the final amount of your donation.

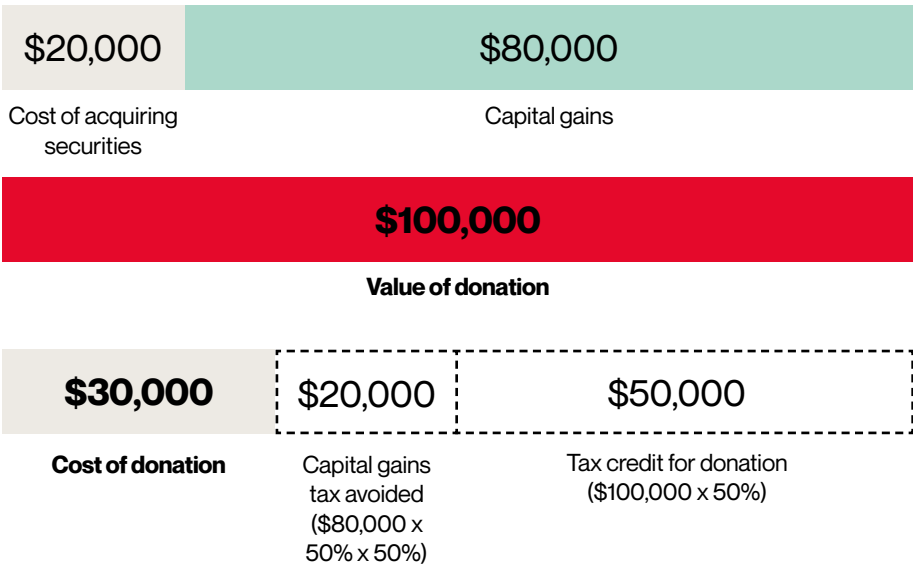
Example
of a gift

- Mr. Heartwell wants to donate \$100,000 to the Foundation.
 - He holds publicly traded securities that he acquired at a cost of \$20,000 and which are now worth \$100,000.
- By choosing to make a gift of shares, Mr. Heartwell will reduce the cost of making a \$100,000 donation to \$30,000, rather than the \$50,000 had he made the donation in cash.

Cash donation



Donation of shares





« Twenty years ago, I had bypass surgery at the Institute. My father was cared for there as well. The Institute is part of our family history. It's a source of deep pride to see its international reputation grow. The care teams are extraordinary. That's why I decided to make a gift of shares — thanks to the tax receipt issued, I was able to give even more. »

Jules Landry

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Patient at the
Montreal Heart
Institute and donor

**Call us to
learn more**

Catherine St-André
Advisory Director

Major and Planned Gifts
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The information contained in the present document is of a general nature and does not, in any way, replace the advice of professionals who may take into account your specific situation.

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