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, 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 Gift of Shares form available on the Foundation's website: https://fondationicm.org/en/ (in the "Donate" section).



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

3

Notify the Foundation of your donation to ensure the transfer is accepted by emailing your completed form to the administrative team at comptabilite.ficm@icm-mhi.org.

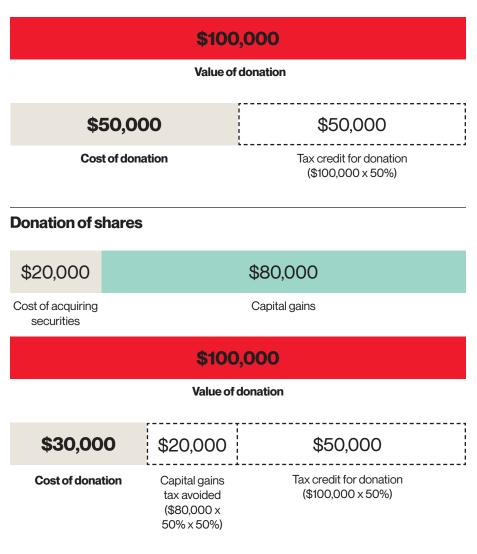


Once we can confirm that the securities have been received, the Foundation will notify you of the final amount of your donation.

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



«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

Patient at the Montreal Heart Institute and donor

Call us to learn more

Mélissa Brinant Advisory Director

Major and Planned Gifts 514 593-2525, ext. 3307 melissa.brinant@icm-mhi.org

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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.