



# Gifts of Securities

Thank you for considering a gift of securities to CKUA Radio Foundation.

A gift of securities to **CKUA Radio Foundation (Charitable No. 118776830 RR 0001)** offers a number of advantages. One significant advantage is that you receive a receipt for the appreciated value of your gift (calculated on the date of transfer) and under current tax rules, the publicly traded securities you donate will be exempt from capital gains tax, but only if you transfer them in-kind. The capital gains tax exemption does not apply if you first sell the securities and then donate the cash proceeds.

The procedure for gifting securities is straightforward. Following your donation of publicly traded securities, we will issue a charitable tax receipt based on the closing value of the shares on the date they are received into our brokerage account.

## The Donation Process

1. Please contact Kevin Fitzgerald, Chief Development Officer ([kfitzgerald@ckua.com](mailto:kfitzgerald@ckua.com)) or any member of CKUA's Development team ([donors@ckua.com](mailto:donors@ckua.com)) about transferring your securities gift. In your email, please provide your contact information, approximate donation value and the date you intend to make the gift so that we can help make your gift process as easy as possible.
2. Please ask your broker to use their **Securities Transfer to a Third-Party Form** and send a copy to CKUA. Your broker will need **CKUA information – National Bank Direct Brokerage – Account 668TZRA and the brokerage ID is NBBS. CKUA Charitable No.: 118776830 RR 0001**
3. Instruct your broker to complete the transfer. Sending a copy of the attached for to your broker may provide sufficient authorization. You may also wish to follow up closely with your broker to help ensure your instructions are carried out promptly as you prefer.

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CKUA Radio Network Foundation Alberta Hotel 9804 Jasper Ave NW Edmonton AB T5J 0C5  
Charitable No.: 118776830 RR 0001

NOTE: The purpose of this Fact Sheet is to provide general information, not to render legal or financial advice. Any changes in the tax structure may affect the examples listed in this information. CKUA Radio Foundation strongly recommends that a donor consult their own professional advisors, family and heirs prior to making any significant gift decisions.



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## Donation of Shares and Securities to CKUA Radio Network Foundation

Declaration of Donor

I, the undersigned, \_\_\_\_\_ First and last name,

Direct \_\_\_\_\_ Brokerage firm Name

\_\_\_\_\_ Brokerage Address,

\_\_\_\_\_ Brokerage Contact

To give/transfer the following security(ies) to **CKUA Radio Network Foundation (Charitable No: 118776830 RR 0001)** at:

**National Bank Direct Brokerage (Brokerage ID - NBCS) Account 668TZRA.**

Security Description	CUSIP/ISIN/SEDOL#	Quantity

**This is a donation to CKUA Radio Foundation, duly registered with Canada Revenue Agency  
Charitable Registration number – 118776830 RR 0001**

To my knowledge these shares are freely tradable and not subject to restrictions on their sale or disposition.

\_\_\_\_\_ Name of Donor/ Transferor

\_\_\_\_\_ Residential Address of Transferor

\_\_\_\_\_  
Signature of Transferor/Donor

\_\_\_\_\_  
Date

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