



Gifts of Publicly Traded Securities and Units/Shares in Mutual Funds

Donors may make gifts of publicly traded securities and units/shares in mutual funds according to Canada Revenue Agency guidelines.

Donors whose assets consist of appreciated stock will be encouraged to take advantage of the capital gain reductions that result from making a gift of these shares directly to CKUA.

The date of the gift is the date ownership is transferred to CKUA. A gift receipt is issued for the value as of the closing date the day the shares are transferred.

The donor may have the shares transferred to CKUA by a professional broker. Notice of the transfer and valuation should come to CKUA Development Committee and/or its designate for gift processing and issuance of a gift receipt.

Donors wishing to deliver shares to CKUA directly should be advised to complete the assignment of ownership witnessed by a third party and by CKUA Development Committee and/or its designate.

If the shares are mailed to CKUA, the endorsed shares should each be sent in separate envelopes, a stock power should be sent under separate cover.

For more information, please contact:

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