



Making an Impact by Donating Securities

Donating publicly traded securities—such as stocks, bonds, or mutual funds—is one of the most tax-effective ways to make a significant gift to the Hôtel-Dieu Grace Healthcare (HDGH) Foundation. Your gift will help us advance healthcare while providing you with valuable tax benefits.

Why Give Securities?

When you donate securities directly to the Foundation, you eliminate the capital gains tax that would apply if you sold them. You'll receive a charitable tax receipt for the full fair market value of the securities, and your gift will make a lasting impact.

Example:

If you purchased stock for \$2,000 and its current value is \$10,000, selling it would trigger tax on the \$8,000 gain.

By donating the stock directly, you avoid the tax and receive a receipt for \$10,000.

Your Options

Donate Now: Transfer securities directly to the Hôtel-Dieu Grace Healthcare Foundation.

Include in Your Will: Leave securities as part of your estate plan for the same tax benefits.

Benefits of a Gift of Securities

The Tax Advantage Doubles:

Eliminate capital gains tax and receive a charitable tax receipt for the full value.

Grow Your Impact:

Make a significant gift without impacting your cash flow.

Please consult your financial, legal, or insurance advisor to ensure your plans reflect your personal goals and tax considerations, and that your family's needs are met.

To learn more about creating your legacy, please contact
Linda D'Aloisio - Senior Development Officer - Legacy Giving
Email: Linda.D'Aloisio@hdgh.org | **Telephone:** (519) 257-5111 Ext.76922