

Gifts of Securities

By donating Stocks or Mutual Funds, you pay no tax on the capital gains and receive a tax receipt for the fair market value of the securities.

Gifts of securities are a tax-effective opportunity to transform an asset into immediate and significant support for the Abbey Retreat Centre. You can help us deliver programming and support to people living with cancer now and into the future.

Help Bring Healing to the Abbey Retreat Centre:

When you make a gift of securities to the Abbey Retreat Centre, you provide community, support and life-enhancing resources to people who are facing a cancer diagnosis.

If you have been touched by cancer, you know how healing it is to have opportunities for rest, reflection, friendship and an introduction to practices that help to soothe, strengthen and tend the body, mind and soul in the midst of a cancer experience.

Abbey Retreat Centre's cancer support programs are increasingly recognized as innovative and critical additions to whole-person cancer care in Canada.

Thank you for your donation. Every gift makes a significant impact.



The Advantage of Donating Securities

A gift of securities is a wise alternative to a cash gift. Flexible choices allow you to decide how you want to give, and the elimination of capital gains tax on gifts of securities provides you with a substantial tax incentive for donating stock.

	Sell securities for cash. Donate after-tax proceeds	Donate securities directly to Abbey Retreat Centre
Market Value of Securities	\$10,000	\$10,000
Original Cost of Securities	\$2,000	\$2,000
Capital Gain	\$8,000	\$8,000
Tax on Capital Gain	\$1,934 ¹	\$0
Donation Amount After-Tax	\$8,066 ²	\$10,000*
Your Charitable Tax Credit	\$3,900 ³	\$4,835**

Other benefits include:

- A charitable tax receipt
- No capital gains tax paid
- Satisfaction of seeing your gift put to good use today

* The Abbey Retreat Centre received an extra \$1,934 when you donate securities directly. That's enough to cover the cost of 1 in-person retreat participant.

** Your tax credit increases by \$935!

¹ One-half of capital gains are added to taxable income. A 48.35% marginal tax rate has been used in our calculation of the taxable portion of the capital gain.

² \$8,066 is the \$10,000 value of securities minus the estimated tax of \$1,934.

³ The donation amount multiplied by the 48.35% marginal tax rate.
You may wish to check with your tax advisor on the capital gains exemption and Tax Credit that is specific to you.

Donor Story: Mark Davis & Patricia Duffy

Most, if not all families are touched by cancer.

A recent tour of Abbey Retreat Centre showed us the inestimable value of the service given to participants. The work done to engage people wherever they are in their journey does so much to support participants and their families as they choose their path on this journey.

We chose to support Abbey Retreat Centre by donating securities instead of cash because the capital gains on the donated securities are tax free.

People are often reluctant to donate securities because they don't know how to do it. It is a simple process. Fill out a short form that Abbey Retreat Centre will supply - and deliver it to your financial institution/your wealth advisor, and they will look after the donation - and Abbey Retreat Centre will provide the necessary tax donation receipt.

For more information about gifts and securities, please contact the Abbey Retreat Centre team at:

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OR

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