

University Settlement

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Charitable #: 119279412RR0001



Over 100 Years of Service in the Community

Gift of Securities

You can show your commitment to the programs and services University Settlement provides by giving a gift of publicly traded securities. At the same time, you will ensure your legacy makes a difference to hundreds of children, youth, seniors and adults.

When you are getting your affairs in order and making your will, you may wish to consider a planned gift of securities to University Settlement, or you may wish to make this gift of securities today.

Giving a gift of stocks or bonds is an innovative and efficient way to minimize the tax paid on current income and a good philanthropic choice. If you would like to make a gift of Securities to University Settlement please call us today at (416) 598-3444 ext. 223.

Gifts of securities will be honoured during the donor's lifetime and can make a positive difference in improving the lives of children, youth, seniors and adults.

Stocks and Bonds

Over the years you may have accumulated a number of stocks or bonds. Whether you hold a modest amount of stocks or bonds, or manage a diverse portfolio, your gift of securities can help individuals and their families to learn, grow and realize their full potential.

Benefits

When you give a gift of publicly traded securities to University Settlement you will:

- Receive a receipt for 100% of the market value of your donation.
- Benefit and profit from an amendment in the federal budget which recently eliminated capital gains tax on these charitable donations.
- Help recruit and train over 500 University Settlement volunteers to deliver support in over 7 departments and over 30,000 people annually

There has never been a better time to give to University Settlement.

How to Give a Gift of Securities

When you are thinking about ways to minimize taxes on your estate, and your taxes in general, think of giving to University Settlement. It may make sense to you and your situation, as giving a gift of a stock or bond can be a great way to minimize the tax paid on current income.



University Settlement understands fully and upholds the important legal and ethical commitment of keeping your personal information private and strictly confidential. When you make the important decision to give a gift of securities it is a requirement that you use the legal name of the charity: **University Settlement**

We do, of course, recommend that you seek counsel from your lawyer and/or from your investment advisor to ensure your plans are carried out in accordance to your wishes.

Should you wish to make a gift of securities to University Settlement and are interested in finding out more information about your options, please contact us at info@universitysettlement.ca to set up an appointment.