



Give Securities, Save Animals.

Join donors like Colleen by making a gift of securities to the Okanagan Humane Society to help save the lives of local animals.

Learn more on the next page.

*Colleen Dickson Eccott,
OHS Philanthropist of
the Year 2022 and proud
Guardian of Zulu*

Gifts of publicly traded securities

Do you want to make a meaningful donation to the Okanagan Humane Society while paying no capital gains tax on appreciated stocks or securities?

A gift of Publicly Traded Securities might be right for you.

How does a Gift of Publicly Traded Securities work?

When you sell an appreciated stock or mutual fund (one that has increased in value since you purchased it), you are required to pay tax on 50% of the capital gain. However, if you donate the securities to charity, you pay no capital gains tax. This makes appreciated stock one of the most cost effective ways to donate to the Okanagan Humane Society.

The following example illustrates the benefit of gifting stock to make a donation versus selling the stock and donating the cash to charity:

	Sell Shares and Gift Cash to Charity	Gift Shares to Charity
Original Cost of Securities	\$1,000	\$1,000
Current Market Value	\$5,000	\$5,000
Capital Gain	\$4,000	\$4,000
Tax on Capital Gains	\$920	\$0
Donation Amount After-Tax	\$4,080	\$5,000
Your Charitable Tax Credit	\$1,876	\$2,300

**\$920 more is donated to the animals, AND
your charitable tax credit is \$424 more!**

For more information

Visit the Securities tab on our website or contact Marni Adams at 250-448-8554 Ext 4 or fundraising@okanaganhumanesociety.com.

Okanagan Humane Society

Registered Charity #: 8888 17269 RR 0001

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.

