

Donating Securities & Mutual Funds to Villa Rosa

If you own publicly listed stocks, bonds or mutual fund investments and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities in kind to Villa Rosa, you can reduce your taxes and avoid that capital gain. The Benefits:

- Many brokerage houses forego fees for charitable transactions.
- Tax advantage – you eliminate the tax on capital gains.
- Listed securities and mutual funds are easy to transfer. We provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to Villa Rosa.
- Your gift can be honoured during your lifetime, should you wish.

A donation receipt is issued for the fair market value of the security at day's end on the date of transfer. You must have your broker transfer the securities to Villa Rosa. The gift will not qualify for the elimination of capital gains tax if the securities are sold and the cash is gifted to Villa Rosa.

There is no minimum commitment to become a Planned Giving Society Member. Your gift of just 1% of your estate can make a major difference.

Please seek professional advice to ensure your financial goals are considered, your tax situation is reviewed and your gift is tailored to your circumstances.

For more information on making a Planned Giving Society Gift to Villa Rosa, please contact Monica Wood, Director of Development at 204 786-1077 extension 254 or monica@villarosa.mb.ca