



Leaving a portion of your estate to Glenbow is an act of philanthropy that demonstrates incredible thoughtfulness, foresight and generosity. You can leave your gift unrestricted and be confident it will address Glenbow's greatest needs in years to come. Or you can choose to give to a particular area, such as new exhibitions, educational programming or preserving the collections.

Whatever you are passionate about at Glenbow, we will ensure your legacy gift has a powerful impact on the community you care about.

## **About Gifts of Appreciated Securities**

Donating shares, bonds, futures or units of mutual funds listed on a public stock exchange to Glenbow is one of the most tax effective ways to create an enduring legacy.

Currently, the Canada Revenue Agency does not apply capital gains taxes on donations of publicly traded securities. However, if you choose to sell appreciated securities during your lifetime (or liquidated through your estate), taxes must be paid on 50 per cent of the capital gains on those securities.

## Benefits

### Tax Effective

You or your estate receives a tax receipt for the fair market value of your gift of appreciated securities. The taxable capital gain is eliminated by giving the securities directly to Glenbow.

### Flexible

You can make an impact with a gift of appreciated securities during your lifetime or through a direction in your will.

### Rewarding

You can make a meaningful gift to Glenbow without depleting cash reserves by putting some of your appreciated securities to work.

## Let Us Know

We would love to hear from you if you are planning to make a gift of appreciated securities to Glenbow. We want to thank you for your generosity and discuss any potential designations you may have.

## Here To Help

Thank you for considering a gift to Glenbow as part of your estate planning. Establishing a legacy gift is a meaningful way to support the long-term viability of your favourite charities and make a lasting impact in your community.

We strongly advise you to consult with your lawyer or investment advisor to learn if a gift of appreciated securities is appropriate for your financial goals.

## How to Arrange a Gift of Appreciated Securities

Speak to your broker or investment manager about arranging an electronic transfer of publicly traded securities into Glenbow's account using the gift of securities form on our website: [www.glenbow.org/join-give/gift-of-securities/](http://www.glenbow.org/join-give/gift-of-securities/)

### Steps

1. Forward the completed transfer form to your broker or investment advisor to initiate your electronic transfer of securities.
2. Forward a copy of the completed form to Glenbow. Unexpected and/or unidentified transfers make it difficult to issue appropriate and timely tax receipts. A contact email is on the gift of securities form.
3. The value of the tax receipt is based on the closing price of the security on the day the securities are received in Glenbow's account, as per Glenbow's standard procedure and Canada Revenue Agency regulations.

## Looking for more information? Ready to have a conversation about giving a gift of appreciated securities? Please contact:

Wendy Fallon  
Director, Advancement Operations

 [wfallon@glenbow.org](mailto:wfallon@glenbow.org)

 403.922.7199

Charitable Registration No. 107435695 RR 0001