BullyingCanada
GIVING BULLIED KIDS A BRIGHTER FUTURE



TAX-SMART GIVING · 2026

Donating Publicly Traded Securities and Mutual Funds

By donating appreciated stocks, securities, and mutual funds to BullyingCanada, you bring peace of mind to bullied children, and you benefit from not having to pay capital gains tax on the investments you donate. You can make this kind of donation during your lifetime, or through your will.

You Choose When You Can Benefit Most From Tax Relief

Capital gains are the increase in the value of your securities over the price you paid when you bought them. When you transfer your shares to BullyingCanada as a charitable donation, the Canada Revenue Agency does not apply capital gains tax to your donation. You should consult a financial advisor to work out whether the tax benefit would help you more during your lifetime, or by reducing estate taxes through a gift left in your will.

How It Works: A Direct Transfer of Stocks, Securities, or Mutual Funds

To take advantage of the elimination of capital gains tax on your donated securities, contact your broker or financial institution and have your securities transferred directly to BullyingCanada.

If you want to donate shares you acquired through an employee stock option plan offered by the publicly traded company you work for, you can take advantage of the elimination of capital gains tax only if you donate the shares within 30 days of buying them, and make the gift in the same calendar year you acquired them. Please complete the Processing Form on page 4 and return it to us to set up the transfer of your donation.

You Receive No Capital Gains Benefit When You Sell Your Securities and Donate the Proceeds

You will still have to pay capital gains tax on appreciated securities, which is based on 50 percent of the increase in value since you bought them. If you take those taxes out of the proceeds, your donation and your charitable tax receipt will both be smaller than if you had donated the securities directly.

What Kinds of Gifts Are Eligible?

You can donate any of the following:

- Shares in publicly traded companies
- Debt obligations or rights listed on a designated stock exchange
- A share of the capital stock of a mutual fund corporation
- A unit of a mutual fund trust
- An interest in a related segregated fund trust
- A prescribed debt obligation

Tax Benefit

The charitable tax receipt you receive will help you reduce the taxes on your taxable income right away. Donations above your annual limit may be carried forward and used in any of the next five years.

The amount receipted is based on the market value of the donated security on the date BullyingCanada receives the gift.

Using the Forms in This Brochure to Make Your Gift

If you wish to make a gift of securities now, please speak to your broker or bank, then complete the Gifts of Securities and Mutual Funds Processing Form on page 4 and return it to us. If you plan to make a gift of securities through your will, please bring the Processing Form to your lawyer when you revise your will. We would also be grateful if you let us know about your future gift by completing the Legacy Gift Confirmation Form on page 5 and sending it to us in confidence.

Join Our Brighter Futures Society

Whether you make a gift of securities during your lifetime or through your estate, we will be honoured to count you as a member of our Brighter Futures Society. We show our great appreciation for our members by listing them on our website. This public show of support shows others your leadership, vision, and compassion, and goes a long way to encourage other people to follow in your footsteps.

Please tell us your wishes for recognition of a gift you are making now on the Processing Form (page 4), or, for a future gift, on the Legacy Gift Confirmation Form (page 5). Mail your form to the address below, or email it to Legacy@BullyingCanada.ca.

Independent Counsel Is Advised

We are happy to share ideas on ways you can create a memorable and meaningful legacy through your support of BullyingCanada. However, the ultimate responsibility for your finances, the tax implications of your donations, and local, provincial, or federal legal requirements rests with you and your financial and legal advisors. We strongly encourage you to seek independent advice when making a will, and when making gifts of cash, insurance, stocks and securities, registered savings, and property.

Processing Instructions

To Transfer Securities to BullyingCanada

1 Complete the Processing Form

Fill in the Gifts of Securities and Mutual Funds Processing Form on page 4.

2 Send a Copy to Your Broker IMPORTANT

The transfer will not begin until your broker has the form.

3 Send a Copy to BullyingCanada IMPORTANT

Email it to StockGifts@BullyingCanada.ca, or fax it toll-free to (866) 780-3592, Attention: Finance Department.

4 Hear From Us Within 48 Hours

If you don't hear from us within 48 hours, please call us at (877) 352-4497.

Estimated Timeline

Stocks and Securities: About 4 Business Days

1. Your broker sends your securities donation to BullyingCanada's broker, RBC Direct Investing Inc.
2. RBC Direct Investing processes and receives the securities (1 to 3 business days).
3. Your securities are posted to BullyingCanada's RBC Direct Investing account, and a sell order is placed (1 business day). The gift amount on your charitable tax receipt is based on the closing price on the day BullyingCanada gratefully receives your gift.
4. BullyingCanada sends you confirmation of your gift within 2 business days of receiving your securities.

Mutual Funds: 10 to 25 Days

Gifts of mutual funds take much longer to process and complete. The gift amount on your charitable tax receipt is based on the price on the day BullyingCanada gratefully receives your gift.

Questions?

For more information, contact Rob Benn-Frenette, Executive Director, BullyingCanada
Phone (877) 352-4497, ext. 203 · Email StockGifts@BullyingCanada.ca

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SEND A COPY TO YOUR BROKER AND TO BULLYINGCANADA

Gifts of Securities and Mutual Funds Processing Form

Donor Contact Information (Required)

Full name(s) _____

Courier address for gift confirmation (no P.O. boxes, please) _____

City _____ Province or territory _____ Postal code _____

Preferred phone _____ Email _____

Donor's Broker Contact Information

Name of firm _____ Contact name _____

Address _____

City _____ Province or territory _____ Postal code _____

Phone and extension _____ Email _____

Securities or Mutual Funds to Be Donated, and Brokerage Account

Name of securities _____ CUSIP # or SEDOL # _____

# of units donated _____ Brokerage account # _____ CUID # or DTC # _____

Important: this transaction will not begin until this form has been sent to the broker of the donor making the gift. To transfer securities or funds, please give your broker these details:

Receiving institution	RBC Direct Investing Inc.
Account name and number	BullyingCanada / 66538900-19
Contact information	Royal Bank Plaza, 200 Bay St., North Tower, P.O. Box 75, Toronto, Ontario M5J 2Z5 · Fax 1-888-722-2388 · Tel. 1-800-769-2560
Routing	INS# T002 · CUID# DOMA · DTC# 5002
Charitable registration number	82991 7897 RR 0001

Your Giving Options

- [ ] I/we would like our gift to BullyingCanada to go where it is needed most.
- [ ] I/we wish to designate our gift to _____
- [ ] Please contact me/us at (phone or email) _____ to discuss how to designate this gift.
- [ ] I/we wish to be recognized as members of BullyingCanada's Brighter Futures Society and be listed on BullyingCanada's website.

  Preferred recognition name _____
- [ ] I/we wish for our gift to be anonymous.

Date _____ Signature _____

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PLEASE DETACH AND RETURN

Legacy Gift Confirmation Form

☐ **Yes, I/we are leaving a heartfelt legacy gift to BullyingCanada.**

Full name(s) and titles _____ _____

Address _____

City _____ Province or territory _____ Postal code _____

Preferred phone _____ Email _____

Type of Gift

- ☐ Gift in will (cash)
- ☐ Gift in will (registered securities or mutual funds)
- ☐ Beneficiary of life insurance or another insurance product

  Insurance company _____
- ☐ Beneficiary of an RRSP or trust
- ☐ I have not pledged a legacy gift yet, but intend to do so soon.
- ☐ Please contact me/us to discuss ways to give.

  By: ☐ phone ☐ email

Designation of Gift

- ☐ I/we would like our gift to go where it is needed most.
- ☐ I/we wish to designate our gift to:

  _____
- ☐ Please contact me/us to discuss how to designate this gift.

  By: ☐ phone ☐ email
- ☐ I/we wish to make our gift in honour of:

  _____

Brighter Futures Society Recognition

- ☐ I/we wish to be recognized as members of BullyingCanada's Brighter Futures Society and be listed on BullyingCanada's website.

  Preferred recognition name(s) _____
- ☐ I/we don't want any form of recognition for our gift.

Date _____ Signature _____

Date _____ Signature _____

This is not a binding legal document. Your signature only confirms that the information above is accurate as of this date. We understand that your circumstances may change over time. If you update your gift plans, please make sure any provision for our organization is directed to "BullyingCanada Inc., Charitable Registration Number 82991 7897 RR 0001".

Please mail, email, or fax this form to:

Rob Benn-Frenette, Executive Director, BullyingCanada
471 Smythe Street, P.O. Box 27009, Fredericton, NB E3B 9M1
Phone (877) 352-4497 · Fax (866) 780-3592
Rob.Benn-Frenette@BullyingCanada.ca

We Are Honoured by Your Gift! Thank You for Giving Bullied Youth a Brighter Future.