



# Protect Someone's Tomorrow with a Gift of Publicly Traded Securities to MedicAlert Foundation Canada

## Give Smarter. Make a Greater Impact.

You've supported MedicAlert Foundation Canada throughout your lifetime. A gift of publicly traded securities allows you to extend that support in one of the most tax-efficient ways possible.

By donating stocks, mutual funds, or other securities directly, you can maximize the value of your gift while minimizing the taxes you pay.

## Why This Gift

If you own investments that have increased in value, selling them may trigger capital gains tax. Donating them directly to MedicAlert eliminates that tax—allowing more of your gift to go toward impact.

It may be a good option if you:

- Hold appreciated stocks or mutual funds
- Want to reduce or eliminate capital gains tax
- Prefer to give from investments rather than cash
- Are looking for a tax-efficient way to make a significant gift

## Benefits to You



**Tax-Smart**  
Eliminate capital gains tax on donated securities



**Impactful**  
Give more than you would by donating cash



**Efficient**  
Receive a tax receipt for the full fair market value



**Simple**  
Transfer shares directly through your broker



**Flexible**  
Give during your lifetime or through your estate



**Strategic**  
Optimize your financial and philanthropic planning



**Meaningful**  
Support life-saving work with a powerful gift

## Important Considerations

To qualify for capital gains tax exemption, securities must be transferred directly. If you sell the securities and donate the cash proceeds, the tax advantage is lost. Transfers can be made from brokerage accounts, mutual funds, or share certificates. Your advisor can guide you through the appropriate process.

## How It Works

When you donate publicly traded securities directly to MedicAlert:

- The securities are transferred to MedicAlert's brokerage account
- You receive a charitable tax receipt for the full fair market value on the date of transfer
- You pay no capital gains tax on the donated securities

If the gift is made through your estate, the same tax advantages apply, helping reduce taxes owed at death.

If your gift exceeds 100% of your net income in the year of death, the tax credit may be applied to the previous year or carried forward through your estate.

## How to Start

1. Speak with your financial advisor or broker
2. Request a transfer of securities directly to MedicAlert's brokerage account
3. Complete any required documentation, including a securities transfer or intent form
4. Notify MedicAlert so we can confirm receipt and recognize your gift

We strongly recommend seeking professional advice to ensure your plans reflect your financial and personal circumstances.

## Let's Continue the Conversation

If you are considering a gift of securities, we would be pleased to speak with you.

You can also let us know if you've already made arrangements so we can thank you and ensure your wishes are understood.

**Call: 1-800-668-1507**

**Email: [legacygiving@medicalert.ca](mailto:legacygiving@medicalert.ca)**

**Visit: [medicalert.ca/planned-giving](https://www.medicalert.ca/planned-giving)**

Your gift helps ensure that MedicAlert can continue to protect Canadians in their most vulnerable moments—today, tomorrow, and for generations to come.