



Donate Shares to the Portage Foundation to Maximize Your Tax Benefits!

Dear donors, we would like to share financial tips to help you optimize your donations on your tax return.

Did you know that donating securities can offer significant tax savings?

Here is an example highlighting the tax advantage of donating securities versus donating the proceeds from selling them:

Year 2025	Individual - Quebec Resident	
	Donation Funded by a Sale of Securities	Donation of Publicly Traded Securities
Donation Value	\$10,000	\$10,000
Adjusted Cost Base	\$2,000	\$2,000
Capital Gain	\$8,000	\$8,000
Taxable Capital Gain*	\$4,000	\$ -
Tax	\$2,132	\$ -
Federal and QC Charitable Donation Tax Credit	\$5,289	\$5,289
Tax Savings from Donation	\$3,157	\$5,289
Net Value	\$3,157	\$5,289
Net Value to Individual	\$3,157	\$5,289
After-Tax Cost to Individual	\$4,711	\$2,579
* For an individual taxed at the maximum marginal rate, considering a <u>50% capital gains inclusion rate</u> .		

If you hold securities (such as shares) or funds in a non-registered account, you could achieve substantial tax optimisation by donating those securities directly. Consult your accountant or investment advisor for more information.

For any information regarding the process of transferring a donation of shares, please contact Colette Taylor, Vice-President of Philanthropic Development, at 514 939-0202, extension 1123.



DONATE YOUR STOCKS IN 2 EASY STEPS:

1 Fill out the form below and return it to the Portage Foundation.

By email to fondation@portage.ca.

Please note that this form does not result in the transfer of shares. It facilitates the tracking of transactions.

2 Contact your broker promptly to transfer the shares.

For full details on the procedure, please contact us by email at fondation@portage.ca.

DONOR CONTACT INFORMATION

Name :

Address :

City :

Province :

Postal Code :

Phone number (work) :

Phone number (home or cell) :

Email :

DONATION DESCRIPTION

Name of the stock :

Number of shares transferred :

Total value of donation :

CONTACT INFORMATION FOR THE DONOR'S BROKER

Name :

Telephone :

Company name :

Email :

DONATION STATEMENT TO THE PORTAGE FOUNDATION

I, the undersigned,

(NAME IN CAPITAL LETTERS)

declare that the above-mentioned property belongs to me and that I may dispose of it at will, and that I give said property to the Portage Foundation, a registered charity under number 12915-1072-RR0001, whose head office is located at 865 Richmond Square, Montreal, Quebec, H3J 1V8.

Completed and signed in _____, on _____

(CITY)

(DAY, MONTH, YEAR)

(DONOR'S SIGNATURE)