Gifts of Publicly Listed Securities

WRHN FOUNDATION
Waterloo Regional Health Network

There are many ways to make a meaningful difference in the future of health care while planning for your financial future.

By thoughtful charitable giving, you can support the health and well-being of your family, friends and neighbours through Waterloo Regional Health Network (WRHN), while exploring giving options that align with your personal values, financial goals and plans for your estate.

Today, 1.4 million people—10% of Ontario's population—rely on WRHN for care. As our region grows, so does the need for expanded hospital capacity, specialized services and innovative approaches to care. With plans for a new state-of-the-art acute care hospital by 2035, WRHN is reimagining health care to serve a growing population expected to reach 2 million.

With the right planning, your gift can create a lasting impact while potentially offering tax advantages and helping you balance your charitable intentions with the needs of your loved ones.

By naming the **Waterloo Regional Health Network Foundation** as a beneficiary of your registered retirement accounts or TFSA, you can transform potential tax burdens into a powerful, lasting gift for regional healthcare.



How It Works

Eliminate Capital Gains Taxes:
When you donate publicly traded securities (stocks, bonds, or mutual funds) directly to the Foundation instead of selling them first, you pay no capital gains tax on the appreciation.

Receive a Full Fair Market Value Tax Receipt:
When you donate publicly traded securities (stocks, bonds, or mutual funds) directly to the Foundation instead of selling them first, you pay no capital gains tax on the appreciation.

Maximize Your Gift's Value:
Removing the capital gains tax burden allows the full value of your investment to support healthcare in our region while maximizing your tax savings.

Example:
If you purchased stock for $2,000 and its value has grown to $10,000, selling it would trigger capital gains tax on the $8,000 growth. Transferring the shares directly to the Foundation eliminates that tax entirely, and you receive a tax receipt for the full $10,000.



Your Options

Donate Securities Today:
Transfer stocks, bonds, or mutual funds directly to the Foundation using our Gift of Securities Broker Form available on our website.

Leave a Gift of Securities in Your Will:
Designate a gift of securities in your Will (as a specific bequest). Your estate receives the same capital gains tax elimination, helping minimize taxes on your final tax return and leaving more for your beneficiaries.

Your Next Steps
Speak with your financial advisor, accountant, or lawyer to determine how donating securities fits into your tax and estate strategy. Because legal wording is important when making specific bequests in a Will, please let us know if we can assist you or your professional advisors with specific wording or transfer instructions.

Our Legal Name:
Waterloo Regional Health Network Foundation
Address:
235 The Boardwalk, Suite 300, Kitchener, ON N2N 0B1
Charitable Registration Number:
889180394 RR 0001

We are here to help
Whenever you wish to explore your options or ask questions, we are here to support you with care and confidentiality.

For more information, **please visit www.wrhnf.ca/donate/legacy-giving** or contact the Waterloo Regional Health Network Foundation at 519-749-6797 or info@wrhnf.ca.

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