

# Marketable Securities

Donating marketable securities or stocks is a generous and tax-friendly way to support compassionate patient care and innovative medical research at St. Boniface Hospital. Such gifts can be made through your estate or in your lifetime.

St. Boniface Hospital Foundation will redeem securities and stocks upon receipt, generating a donation receipt for you reflecting the full market value of securities on the day the securities are received.

Securities eligible for gifting to charity are listed securities or publicly traded securities, which include:

- Stocks and bonds
- Treasury bills
- Warrants and futures traded on stock exchanges
- Mutual funds offered by Canadian mutual fund management companies

Please Note: The 2023 Federal Budget introduced new rules for the Alternative Minimum Tax (AMT). Starting in 2024, this may change how capital gains are taxed on the securities you donate. You should always consult your financial planner before donating marketable securities to ensure you understand how current rules will affect you.