

GIFT OF SECURITIES OVERVIEW

THE LEARNING PARTNERSHIP

The Learning Partnership is a Canadian charity that prepares students to thrive in a diverse, connected and changing world. We leverage the best thinking from educators, business, and government to deliver experiential programs for students that cultivate entrepreneurial thinking and support social emotional learning. Since 1993, we have been helping build the foundations for students to solve tomorrow's challenges.

ADVANTAGES OF DONATING SECURITIES

Making a gift of securities to The Learning Partnership is a worthwhile alternative to donating cash. The elimination of capital gains tax on gifts of appreciated securities provides donors with substantial tax incentives. By donating appreciated stocks, mutual funds, stock options or flow through shares to The Learning Partnership, donors are exempted from this tax and receive a tax receipt for the fair market value of the securities.

HOW TO DONATE IN TWO EASY STEPS

1. Complete the attached Gift of Securities Form and submit to your broker to initiate the transfer.
2. In order to facilitate a transfer of securities and to ensure you receive your official tax receipt, please return a copy of the completed form to Sushma Subedi, Director of Finance at The Learning Partnership.

Please note: Securities are transferred anonymously into our account. Notifying us of this transfer will ensure you receive your official tax receipt. Unexpected and/or unidentifiable transfers may cause a delay in gift recognition and receipting.

Sushma Subedi
Director of Finance
The Learning Partnership
45 Sheppard Avenue East, Suite 400
Toronto, ON M2N 5W9
Phone: 416-440-5110 / email: ssubedi@thelearningpartnership.ca

An official tax receipt will be issued for your gift. The Learning Partnership respects your privacy. Our staff will always ensure to hold all donor information in strict confidence in accordance with all privacy legislations. Your name will be taken off any and all internal lists if you provide written request. If you have any questions about our Privacy Policy, your gift and/or our programs please contact Sushma Subedi, Director of Finance at The Learning Partnership at 416-440-5110 or by email at ssubedi@thelearningpartnership.ca.

The Learning Partnership 45 Sheppard Avenue East, Toronto, ON M2N 5W9
www.thelearningpartnership.ca

GIFT OF SECURITIES FORM

Please email completed and signed form to three parties: your broker, luciano.agozzino@rbc.com (The Learning Partnership's broker), and ssubedi@thelearningpartnership.ca (The Learning Partnership's Director of Finance), or mail to The Learning Partnership, 45 Sheppard Avenue East, Toronto, ON M2N 5W9.

DONOR INFORMATION

Name of donor: _____

Mailing address: _____

Province: _____

Postal code: _____

Phone # (Home): _____

Phone # (Bus): _____

Email address: _____

Recognition name (Name to appear on donor listings, if different from above) _____

I wish to remain anonymous.

DONOR BROKER INFORMATION

Delivering institution: _____

Account #: _____

Account name: _____

Contact name: _____

Phone # (Bus): _____

Contact email: _____

Fax #: _____

SECURITIES TO BE DONATED

Name & Type of Security: _____

Symbol of Security: _____

of units or shares: _____

CUSIP: _____

Please be advised that the value of the donation will be based on the closing price of the security, on the day the securities are received in The Learning Partnership's brokerage account.

THE LEARNING PARTNERSHIP'S BROKER INFORMATION

Name of firm: RBC Dominion Securities

Account #: 414-04742-16

Contact name: Luciano Agozzino

CUID: DOMA DTC: 5002

Mailing address: 3300 Highway #7, Suite #701 Concord, ON L4K 4M3

Phone #: 905-738-5118

Email: luciano.agozzino@rbc.com

DONOR RELEASE

I authorize the transfer of these securities to The Learning Partnership. The Learning Partnership may contact my broker for the purpose of this transfer.

SIGNATURE: _____

DATE: _____

THANK YOU FOR YOUR SUPPORT!