



LEGACY GIVING

Are you looking for a way to leave a natural legacy for future generations? Legacy giving is a way of contributing to wilderness protection by giving a living legacy to preserve, for time immemorial, the natural landscapes of our great nation, and ensure the long-term survival of the species that live there.



Ashley Hockenberry



Wayne Lynch

WHAT IS LEGACY GIVING?

Legacy Giving is a form of gift planning that allows you to structure your gift in a way that maximizes tax benefits and helps you to achieve your personal financial goals, while giving vital support to a cause you believe in.

Legacy gifts include both outright and deferred gifts. An outright gift may consist of securities or mutual funds, which are structured and timed to limit any tax on the capital gain and obtain full benefit of the tax credit. Deferred gifts include bequests and life insurance policies, where the commitment is made now but the funds are not available to the charity until some future time.

We invite you to explore your legacy gift options and recommend that you discuss any donation with your financial advisor and/or lawyer.



Graham Osborne

BEQUEST OPTIONS

Sum of Money:

Leave a sum or percentage of estate.

"I give the sum of \$_____ (or an amount equal to _____% of my estate) to The Canadian Parks and Wilderness Society (CPAWS) for its general charitable purposes.

Property(ies):

Leave property(ies) such as real estate, stocks, bonds, jewellery, works of art, or other items. Unless the property is useful to CPAWS, it will be sold, and the proceeds, less any appraisals and selling costs, applied per the terms of the bequest.

"I give to the Canadian Parks and Wilderness Society (description of property)..."

Rest and residue of estate:

Leave a percentage of what remains of the estate after paying debts, taxes, expenses and other bequests.

"I give to the Canadian Parks and Wilderness Society all (or stated percentage) of the rest, residue, and remainder of my estate..."

Contingent bequest:

Leave a gift only if the testator is not survived by certain individuals.

"If (name/s of primary beneficiary/ies) does/ does not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to CPAWS (describe amount of cash, property or percentage of residual estate)..."

LIFE INSURANCE OPTIONS

Giving a gift of life insurance allows you to make a major contribution with a very minimal outlay for a specific period of time. It involves naming CPAWS as either the owner or the beneficiary of a new or existing life insurance policy. Upon death or maturity of the life insurance policy, the proceeds are paid directly to CPAWS. As the donor, you are able to make a significant gift without diminishing the value of your estate.

All life insurance premiums paid on your donated policy are part of your charitable gifts for income tax purposes. CPAWS will issue a tax receipt that will entitle you to a tax credit, significantly reducing your income tax. The exact tax benefit depends on the province you live in.

New policy:

When you apply for a new insurance policy, you can name CPAWS as the owner and beneficiary. Tax receipts will be issued to you for the premiums you've paid to the life insurance agency for the policy. Upon the maturity of the policy, or at death, the proceeds are immediately payable in cash to CPAWS.

Existing policy:

Often as personal circumstances change, life insurance policies that were once important are no longer needed. Perhaps the children have grown up and are on their own, or the mortgage is paid. An existing policy can be donated to CPAWS as an irrevocable gift by simply contacting your life insurance agent and changing the ownership and beneficiary. You would receive an immediate tax benefit through a tax receipt issued for the surrender value (about the value of the premiums paid to date) and would receive tax benefits for all subsequent premium payments.

BEQUEST CONFIRMATION FORM

A bequest in your will in support of the Canadian Parks and Wilderness Society (CPAWS) is a simple, thoughtful way to create a legacy. This future gift will ensure that the programs, services and activities of CPAWS will benefit our wilderness for generations to come.

☐ I have included CPAWS in my will.

☐ I intend to include CPAWS in my will.

An insight into your bequest would be helpful in planning the financial future of CPAWS. To that end, we invite you to share your plans with us.

My will provides CPAWS with:

☐ a percentage of my estate;

☐ a specific amount;

☐ the residue of my estate after other bequests have been made;

☐ a specific item of value. Details:

The approximate amount of my bequest to the society is: \$ _____ or _____ % of my estate.

On behalf of CPAWS, we would like to thank you for your intended bequest by recognizing CPAWS in your plans.

☐ I/We authorize CPAWS to list my/our name(s) as member(s) of the Society. I/ We would like to be listed as follows:

☐ I/We wish my/our gift to be anonymous.

Name(s): _____

Address: _____

Telephone (day): _____

Telephone (evening): _____

Email: _____

Signature of donor:

Signature of joint donor (if applicable):

Dated:

THANK YOU!

 **CPAWS**
CANADIAN PARKS AND WILDERNESS SOCIETY



Graham Osborne

SECURITIES & MUTUAL FUNDS

Making a direct donation of shares from the profits of your securities or mutual funds is a tax-efficient way to support CPAWS. As the Canada Revenue Agency does not apply capital gains tax on donations of publicly traded securities, you can donate the shares directly to CPAWS without owing capital gains tax. CPAWS gets a larger donation and you get a tax receipt which reflects your larger contribution.

BEQUEST

There are a number of ways that you can leave a bequest for CPAWS in your will. These include leaving a specific sum of money, a percentage of the rest and residue of your estate, or particular property such as real estate, stocks, bonds, jewellery, art or other items.

If you do not already have a will, we suggest you consult with a lawyer to guide you in its preparation.

For more information on legacy giving or
how to leave a bequest, contact:



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