

A
GESTURE
OF
THE
HEART ♦

GIFTS IN WILLS

Leave your values as your legacy



Centraide
of Greater Montreal

GIFTS IN WILLS

A simple and easy way for anyone to leave a legacy.

A bequest is one of the simplest types of planned gifts. This is why many donors have made a significant bequest to the Centraide of Greater Montreal Foundation in their wills.

If you care about Centraide of Greater Montreal's mission, you can make a bequest in your will regardless of the value of your estate. You simply have to be of legal age and have the capacity to sign a will.

Decide what you want in the future, today...

A will lets you plan for the many decisions that will have to be made after your death. If you don't have a will, prevailing laws will apply to your estate. In Quebec, you cannot make a joint will with your spouse. Each person must produce and sign his or her own will. However, you can add a clause to your will so that your gift is only remitted to the Foundation, for example, if your spouse predeceases you.

Also, funeral wishes set out in your will could include a clause suggesting that family and friends donate to the Centraide of Greater Montreal Foundation in your memory.

...and increase your donation's impact in perpetuity.

Your donation invested in the Centraide of Greater Montreal Foundation will create income in perpetuity and continue to generously benefit future generations, year after year.

Types of bequests

- Specific bequest: gift of a specific asset (amount of money, shares, real estate, etc.)
- Universal bequest: donation of all your assets
- Legacy by general title: donation of a share or percentage of your assets or a type of asset
- Residuary bequest: donation of all remaining property after specific bequests have been distributed

**Talk to
your financial
advisor**

Note that this document is for information purposes only. We encourage you to contact your legal or financial advisor for more information about the charitable giving vehicle that best suits your goals and the needs of you and your family.

Benefits

This type of gift is for you if you want to:

- Preserve all of your financial resources during your lifetime
- Keep control of your assets until your death
- Easily change your wishes depending on your personal situation
- Minimize your estate's tax burden

SAMPLE BEQUEST LANGUAGE

Please include the Centraide of Greater Montreal Foundation (Charitable No. 118920909 RR 0001) in the clause of your will.

Specific bequest

'I leave the amount of \$ _____ (or description of the bequeathed property: shares, life insurance policy, building, etc.) to the Centraide of Greater Montreal Foundation for the purpose of supporting this organization's mission.'

Universal bequest

'I leave all my property and real estate to the Centraide of Greater Montreal Foundation for the purpose of supporting this organization's mission.'

Legacy by general title

'I leave _____ % (e.g., 75%) of all my movable and immovable property to my children (or other person) and I leave _____ % (e.g., 25%) of all my movable and immovable property to the Centraide of Greater Montreal Foundation for the purpose of supporting this organization's mission.'

Residuary bequest

'I leave by particular title \$ _____ to my son (or other person) and I leave the remainder of all my movable and immovable property to the Centraide of Greater Montreal Foundation for the purpose of supporting this organization's mission.'

An example of generosity

Ms. Caresgreatly is 44 years old and has a spouse and 2 children. She has given to the Centraide of Greater Montreal campaign at her workplace for many years. She and her husband trust Centraide because they know that their donations are invested where needs are greatest in our community. They know they can make a donation in their will, but they want to leave most of their assets to their children.

Ms. Caresgreatly therefore made a plan to generously bequeath her assets: when she and her spouse decided to make their will upon the birth of their first child, she included a residual bequest to Centraide of Greater Montreal. In other words, any assets that remain after her planned bequests go to her children will then go to Centraide.

RECOGNITION

Become a member of the Forever Fund...

The Forever Fund recognizes donors who have made a planned gift to Centraide of Greater Montreal, for example, by leaving a gift in their wills to the Centraide of Greater Montreal Foundation.

...and inspire the community with a message of hope for future generations!

Your decision to contribute to our community will set an example of how anyone can show their local love in their own way and help build a fairer and stronger Greater Montreal.

Centraide of Greater Montreal's Planned Giving team can help you with the giving process in the strictest confidence. Contact us at 514-350-7295 or heritage@centraide-mtl.org.



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