



A Gift in Your Will

A charitable gift in your Will of any size is a meaningful way to support the organization(s) you care about and live out your values. A charitable legacy gift is a direction in your Will that instructs your Executor(s) or Trustee(s) to leave one or more of your assets to a charitable organization.

Leaving a gift in your Will is simple and can help ensure that the causes that matter most to you continue into the future.

The Benefits to You

Simple – A legacy gift in your Will is easy to arrange. Simply instruct your lawyer to include a gift to the organization of your choice.

Convenient – A legacy gift can be made regardless of your age and can be for any amount. It may include cash or securities (stocks, bonds, mutual funds).

Flexible – Your gift can be for a specific amount, a percentage of your estate, or the residue of your estate (what remains after debts and other gifts are paid).

Tax Relief – A charitable gift in your Will can be an effective way to reduce taxes payable by your estate.

Tax Planning – The charitable organization will issue a tax receipt for the full value of your gift. This receipt may be used to reduce taxes payable on your final tax return, subject to applicable tax legislation.

In Tribute / In Memory – Your gift can serve as a lasting tribute to you, your family, or someone you wish to honour.

Peace of Mind – You may revise your Will at any time should your circumstances change.

How Your Gift Can Make a Difference

Your legacy gift can support:

- Innovative programs and new initiatives
- Community outreach and social impact work

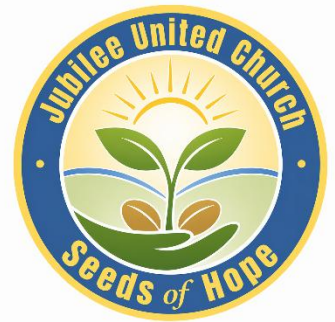
- Youth programs and leadership development
- Training and education
- Support for vulnerable populations
- Local, regional, or national initiatives
- Any purpose that reflects your vision for the future

You may choose to leave your gift unrestricted (for greatest flexibility) or direct it to a specific area of interest.

Seeds of Hope

Individuals and families who confirm a legacy commitment are invited to join our legacy recognition circle Seeds of Hope. This recognition honours your commitment and your vision for the future.

If you would like to discuss your wishes or explore options, we encourage you to speak with a representative of the organization.



Sample Clauses for a Gift in Your Will

These sample clauses are provided for general guidance only. Your lawyer or estate planner should review all wording to ensure it reflects your wishes and complies with applicable laws.

1. Specific Amount – Unrestricted (Most Flexible)

I give and bequeath to **Jubilee United Church** the sum of \$_____ to be used for any purpose approved by its governing body.

2. Specific Amount – Restricted with Clause to Vary

I give and bequeath to **Jubilee United Church** the sum of \$_____ to be used for the following purpose(s): _____.

If the organization is unable to apply all or part of these funds for the specific purpose(s) stated herein, its governing body may redirect the gift to a purpose as close as possible to my original intent.

3. Percentage of Estate – Unrestricted

I give and bequeath to **Jubilee United Church** _____% of the residue of my estate to be used for any purpose approved by its governing body.

4. Percentage of Estate – Restricted with Clause to Vary

I give and bequeath to **Jubilee United Church** _____% of my estate to be used for the following purpose(s): _____.

If the organization is unable to apply all or part of these funds for the specific purpose(s) stated herein, its governing body may redirect the gift to a purpose as close as possible to my original intent.

5. Residual Gift (After Other Bequests)

Upon the death of the survivor of my _____, I direct my Trustee to transfer and deliver the balance of the residue of my estate, including any undistributed income, to **Jubilee United Church**.

***PLEASE SEEK EXPERT ADVICE:** Any gift made during your lifetime or through your estate requires professional advice. Jubilee United Church strongly recommends that you seek such advice to ensure your financial goals are considered, your tax situation reviewed, and that your gift is tailored to your circumstances. A financial or legal advisor should review in detail what best fits your needs.*

Contact Information

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