



Timeless contributions. Endless possibilities.

## Building a gift in your will to Edmonton Community Foundation

### STEP 1: Select a gift type:

I give to the Edmonton Community Foundation, BN/ Registration No. 122437072 R0001

- \_\_\_% of the residue of my estate ..... OR
- \$\_\_\_\_\_ (specify amount)..... OR
- an amount equal to the fair market value of "description of property" at the date of my death..... OR
- "description of property"... (caution – contact us to discuss)

### STEP 2: Choose how we use your gift:

#### For gifts of any amount:

- to add to the \_\_\_\_\_Name of Fund that already exists.

*Gifts to the "Community Fund" allow our Board to respond to emerging and priority charitable needs and programs in our community.*

*You may add any amount to virtually any other fund that already exists at the Edmonton Community Foundation. Please ensure that the name of the Fund corresponds exactly to the name of the Fund that exists.*

#### For gifts of \$10,000 or more:

- to create or add to a permanent endowment fund in accordance with any written agreement I reach with the Edmonton Community Foundation during my lifetime.

The agreement will set out the name of the fund and how we are to use the endowment fund. We provide the wording for these fund agreements to ensure they comply with the regulatory rules that govern the Edmonton Community Foundation and that all charities and activities are accurately described. Please contact us to discuss how you wish for your endowment fund to provide for the charities and causes important to you.

**STEP 3: Changes in circumstances may create additional gifts:**

Please consider including in your document a clause that allows a failed or lapsed gift, for example a gift given to a predeceased beneficiary, to be given to the Edmonton Community Foundation.

**STEP 4: Tax Incentives:**

A special tax incentive exists for "in-kind" gifts of "publicly traded securities". Therefore, make sure your will gives your executor the power to choose to make your gifts to the Edmonton Community Foundation "in cash or in-kind".

This document is not intended to provide or replace legal advice. Donors and their advisors seeking specific information or wishing to obtain a sample fund agreements for review, please contact the Edmonton Community Foundation directly at 426-0015. One of our Donor Services staff will be pleased to help you.