



## **Plan a Meaningful Gift for Future Generations**

### **The Empower Simcoe Foundation's Legacy Gifts Program**

Through thoughtful planning, you can ensure a brighter future for many generations to come. By including the Empower Simcoe Foundation in your estate plans, you will help empower people of all abilities to lead meaningful and inclusive lives now and well into the future.

We are happy to work with you and your professional advisor to ensure the gift you choose to leave best suits your needs and wishes.

For further information on how you can leave a legacy gift or a gift of stocks and securities to the Empower Simcoe Foundation, please see below.

### **How do I plan my gift to the Empower Simcoe Foundation?**

Creating a Legacy Gift does not mean depriving your family and loved ones to accommodate a charity, nor should it be a strain on you or your loved ones. Well planned, a legacy gift can even create a tax advantage for your estate. We strongly recommend you ask your financial advisor how this may be possible in your situation.

A *residual gift* in the form of a bequest in your will constitutes the balance of an individual's wealth once his or her fixed obligations are met. For example, you could provide a determined amount of money to your children and grandchildren, and leave a percentage of the remaining funds to the Empower Simcoe Foundation.

You could also choose to leave a specific percentage of your estate to the Empower Simcoe Foundation. For example, you may choose to divide your estate into equal portions among your children and grandchildren, and donate the final portion to the Foundation.

## **How do I name the Empower Simcoe Foundation in my will?**

The most effective way to contribute to empowerment and inclusion for generations to come is through planned giving, also known as granting a legacy or making a bequest. You may specify how you wish your gift to be used; however, a general gift allows the Empower Simcoe Foundation to direct the funds received to the areas of greatest need.

To establish a legacy gift, please instruct your lawyer to include the following statement in your will:

### **Clause for your will**

I give to the Empower Simcoe Foundation, 39 Fraser Court, Barrie, Ontario, Canada L4N 5J5 the sum of \$ \_\_\_\_\_, or \_\_\_\_% of the residue of my estate or my property at \_\_\_\_\_ in the City of \_\_\_\_\_. The disposition of my bequest is to be used by the Empower Simcoe Foundation at the discretion of its Board of Trustees and executive officers. The receipt of a lawfully designated Officer of the Empower Simcoe Foundation shall be sufficient discharge therefor.

The above is one form of a statement you can include in your will. Different statements are available for different types of legacy gifts – please contact us for more information.

## **What resources do I need to provide to my advisors?**

We recognize the importance and impact of the work of professional advisors, including financial planners, estate lawyers, trust officers and funeral directors.

Below you will find the Empower Simcoe Foundation's legal name and charitable registration to provide to your advisors.

### **Legal name and charitable registration**

Legal Name: Empower Simcoe Foundation

Charitable Registration Number: 89615 5629 RR0001

**Mailing Address:**

39 Fraser Court  
Barrie, ON L4N 5J5  
Canada

**How do I prepare or revise my will?**

A will is crucial in ensuring your assets will go to the people and causes you support.

You can amend your wishes at any time by making a Codicil to your existing will or by creating a new will. In your will, you can designate a specific sum of money, or a percentage of your estate, or investments, including RRSPs and RRIFs.

Please see “How do I name the Empower Simcoe Foundation in my will” above for sample wording if you would like to leave a gift to the Empower Simcoe Foundation in your will.

We strongly recommend you consult your lawyer if you are considering including the Empower Simcoe Foundation in your estate plans.

**How do I give gifts of stocks or securities?**

When you donate your securities directly to Empower Simcoe Foundation, capital gains aren’t subject to tax. So Empower Simcoe receives a larger gift, and you’ll benefit from a tax receipt for the full value of your eligible securities or mutual funds.

Empower Simcoe Foundation will accept publicly-traded securities, including shares, bonds or mutual fund units, instead of cash donations. It’s easy! For donations valued under \$10,000, click [here](#) to go to our convenient Donation of Securities form.

To make a Donation of Securities valued at \$10,000 or more, please contact Esther Rowaan – see contact information below.

Empower Simcoe Foundation recommends that you consult with your financial advisor before initiating any donation of securities.

For more information on how you can give a legacy gift to the Empower Simcoe Foundation, please contact Esther Rowaan, Donor Development Specialist, at 705-726-9082 ext. 2285, or by email at [foundation@empowersimcoe.ca](mailto:foundation@empowersimcoe.ca).

### A Donor's Story



*The King Family*

“Throughout Empower Simcoe’s history, they have maintained service excellence with their highly dedicated and experienced staff. They have played an integral part of our family’s life over a very long time. Our children have thrived from these interactions, activities and support. We have made monthly donations for years. We also named the Empower Simcoe Foundation in our wills, because we know our children will still be accessing services for years to come, and we also hope to help others. **We could never repay the gratitude we have for what Empower Simcoe has done for us, but we have made these gifts so that their services can continue forever.**”

- Rose Mary King

The content of this document was adapted from the Empower Simcoe Foundation’s Legacy Gifts web page:

[www.empowersimcoe.ca/foundation/legacy-gifts](http://www.empowersimcoe.ca/foundation/legacy-gifts)