

## “YES, I want more information!”

I would like more information about:

- Making a bequest to the congregation
- Naming the congregation as a beneficiary of a life insurance policy
- Naming the congregation as a beneficiary of an RRSP/RRIF/TFSA
- Other possible types of legacy giving to the congregation

I have already done this:

- Made a bequest to the congregation
- Named the congregation as a beneficiary of a life insurance policy
- Named the congregation as a beneficiary of an RRSP/RRIF/TFSA
- Made another type of legacy gift

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Address

\_\_\_\_\_  
Email

*You can return this form to the church office, Stewardship Committee mailbox, or using the contact information on the next panel.*

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*“At this stage of my life it really matters that my giving reflects the value I place on having the congregation at the heart of my life and here for generations to come.” – J. G.*

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## Who can give?

Legacy giving is possible for almost everyone. Contact us for more information.

## Contact Us

For more information on legacy giving to the congregation, contact Maury Prevost at 613-231-7391 or [mmprevost@sympatico.ca](mailto:mmprevost@sympatico.ca) or contact Finance Manager, Michelle Jackson, at 613-725-1066 x222 or [fm@firstunitarianottawa.ca](mailto:fm@firstunitarianottawa.ca)

Web: [www.firstunitarianottawa.ca](http://www.firstunitarianottawa.ca)

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*This brochure does not constitute legal or financial advice.*

## Legacy Giving



**FIRST UNITARIAN  
CONGREGATION OF OTTAWA**

**LEGACY  
GIVING**  
ANOTHER WAY  
TO GIVE



**Living Our Generosity**

## What is Legacy Giving?

Legacy Giving generally involves planning gifts that will benefit the congregation in the future. Such gifts can allow you to make a substantial, long-term financial contribution independent of your current financial needs.

The two principal types of legacy gifts are 1) **bequests** (gifts by will) and 2) **beneficiary designations**. Talk to us about other possible types.

**Bequests** can be for a specific amount of money and/or specific assets, all or a fraction of what remains after other obligations are met, or contingent on other conditions being met, such as the prior death of other beneficiaries.

**Beneficiary designations** (naming the congregation as a beneficiary) can be done for a life insurance policy, or other accounts\* such as an RRSP or RRIF or TFSA.

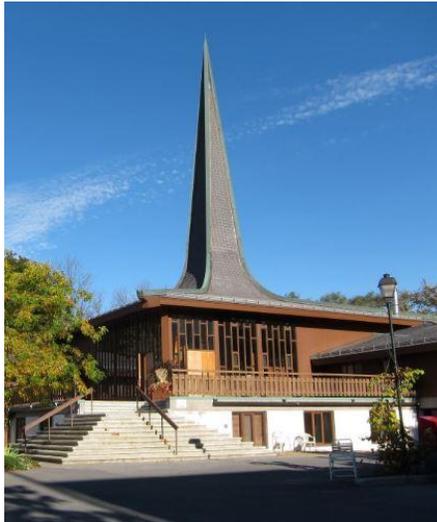
*\* If you are a Quebec resident, such designations must be done in your will.*

## Benefits of Legacy Giving

Legacy gifts:

- Are often the largest gift you can make to a cause close to your heart
- Have no impact on income or assets during your lifetime
- Can help reduce taxes on your estate\*
- Are relatively easy to change (“revocable”)
- Will be a good source of future funding for the congregation

*\* Certain types of gifts not covered in this brochure can provide tax benefits during your lifetime.*



## Tips regarding Legacy Giving

Some important things to consider in your planning are:

- Always have a will and Powers of Attorney (for health care and property)
- Seek professional legal and financial advice according to your province of residence
- Discuss your plans with family and others implicated, including beneficiaries such as the congregation
- Make your gifts as unrestricted as possible, because future needs are notoriously difficult to predict