

“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.

“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.

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 or contact Finance Manager, Michelle Jackson, at 613-725-1066 x222 or fm@firstunitarianottawa.ca

Web: 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.

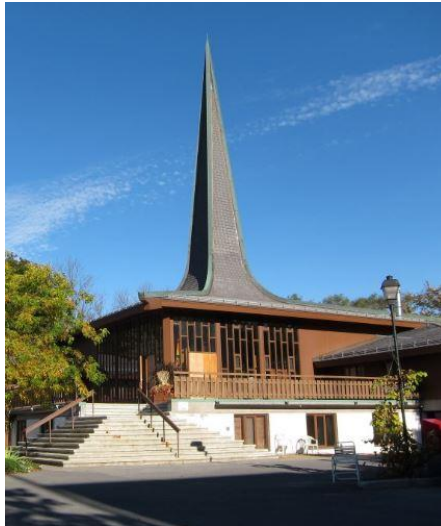
** If you are a Quebec resident, such designations must be done in your will.*

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