

Easy Ways **You Can Make a Lasting Impact**  
for Humane Society of Kawartha Lakes



## Gifts That Cost You Nothing Now

Keep the Humane Society of Kawartha Lakes serving animals with your Will and by bequest. **Pages 3-4**

## Gifts That Benefit Your Loved Ones

Provide for your family and heirs in addition to the Humane Society of Kawartha Lakes with a gift of life insurance. **Page 4**

## Other Ways to Give

Give peace to more animals with gifts in memory and tribute or from your donor-advised funds. **Page 5**



## Gifts That Cost You Nothing Now

To create your legacy for the Humane Society of Kawartha Lakes, you can simply sign your name. That's how easy it can be to include a gift in your Will. It costs you nothing now, but your impact goes on for generations.

Leaving a gift in your Will improves the quality of life for all animals in the Shelter. It also provides for programs to benefit all animals in your community.

Once your family and friends are provided for, please consider making your concern for the Humane Society of Kawartha Lakes part of your life story with your legacy gift.



### Gifts in a Will

When you remember the Humane Society of Kawartha Lakes with a gift in your Will, you make a lasting contribution to our work. Your legacy gift will drive the most urgent priorities for the Humane Society of Kawartha Lakes.

Here Are the Ways Most People Like to Make This Lasting Gift:

#### Residual Bequest

The Humane Society of Kawartha Lakes receives a percentage of the remainder or residue of your estate after other specific legacies have been fulfilled. This gift will be used where it is needed most. A lot of people prefer to give a residual gift as it keeps in line with inflation and is unlikely to lose value over time.

#### Specific Bequest

The Humane Society of Kawartha Lakes receives a specific dollar amount or a specified gift in kind (property, collections, books, jewelry, and so on). Gifts in kind will be sold, and the proceeds will be used by the Humane Society of Kawartha Lakes where it is needed most.

\*See Sample Bequest and Codicil Language. Page 6

#### The One-Minute Bequest

Now it is easier than ever to create your legacy of care and concern for the Humane Society of Kawartha Lakes. You can do it with the One Minute Bequest.

It takes only a few minutes of your time. It costs you nothing to make this gift that will support the Humane Society of Kawartha Lakes for years to come. And it doesn't require assistance from lawyers or advisors (although we encourage you to consult with experts before making any donation). You only need a Registered Retirement Savings Plan, a Registered Retirement Income Fund, or Life Insurance.

## Here's How It Works:

- Step 1** Request a Single or Multiple Beneficiary Designation Form for your Registered Retirement Savings Plan, your Registered Retirement Income Fund, or your life insurance policy from your plan administrator.
- Step 2** Fill out the form and name the Humane Society of Kawartha Lakes as the only or one of the beneficiaries.
- Step 3** Return the form to your plan administrator.



It's that easy. In just three steps, you can make a gift to the Humane Society of Kawartha Lakes that costs you nothing now and will make the future bright for many animals.

## Gifts That Benefit Your Loved Ones Too

You can make a gift that will protect the future of the Humane Society of Kawartha Lakes for generations to come and, at the same time, provide for your family and heirs.

### Life Insurance Gifts

A gift of life insurance lets you support the Humane Society of Kawartha Lakes in a significant and meaningful way. By paying modest life insurance premiums today and naming the Humane Society of Kawartha Lakes as a beneficiary, you can make an impactful gift that will demonstrate your commitment to the work of the Humane Society of Kawartha Lakes.

One way to leave this gift is to assign the Humane Society of Kawartha Lakes as the sole or one of the co-beneficiaries of your policy or the life insurance policy from an employer. Your estate will receive a tax receipt equal to the direct benefit to the Humane Society of Kawartha Lakes. In this way, you create your legacy and benefit your heirs through a significant tax reduction.

A second option is to purchase a new policy, name Humane Society of Kawartha Lakes as owner and receive tax receipts, during your lifetime, for any premiums paid after the date of transfer.



## Other Ways to Give

You have even more options available to create your legacy for the Humane Society of Kawartha Lakes. Your generosity will safeguard the Humane Society of Kawartha Lakes's work today and tomorrow for future generations to benefit.

### Gifts of Stocks, Mutual Funds and Securities

Donating publicly-traded stocks and securities provides a tax-advantageous way to support the Humane Society of Kawartha Lakes. When you make a gift of stocks, you receive a tax receipt for the fully appreciated value of your gift and will not have to pay tax on the realized capital gain. The receipt value will reflect the closing price on the date stocks are received by the Humane Society of Kawartha Lakes. The standard capital gain inclusion rate of 50 percent on selling shares is eliminated when you transfer your shares to the Humane Society of Kawartha Lakes rather than selling the stocks and donating the proceeds. You may transfer publicly traded stocks and securities electronically from your brokerage account using Canada Helps\*.

\*Please follow the instructions on Page 7.

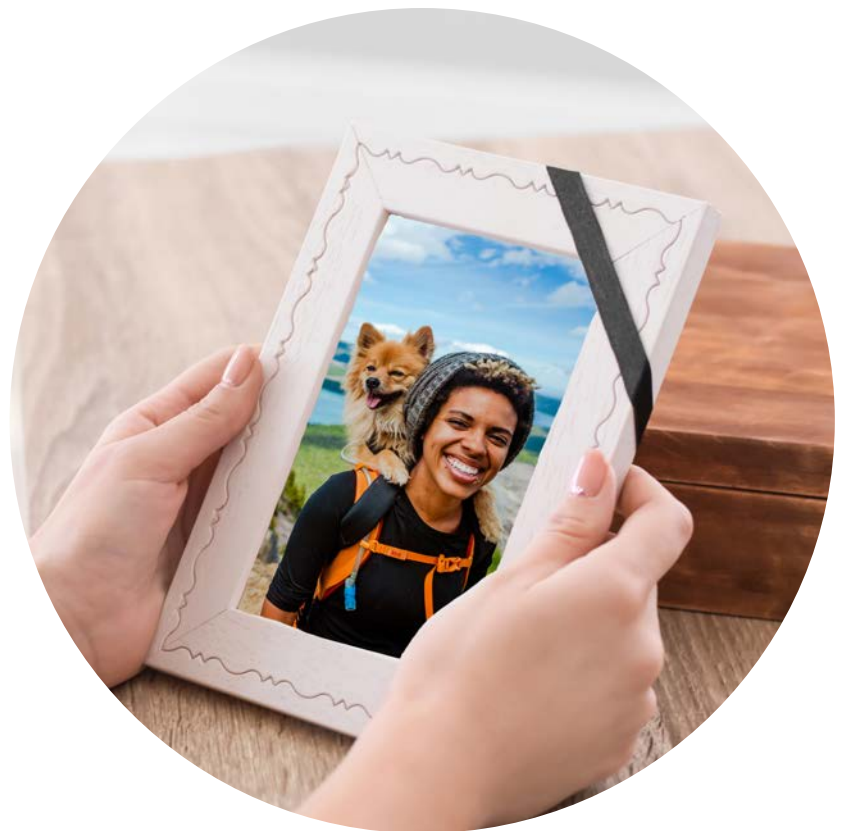
### Gifts in Memory and Tribute

A memorial or tribute gift to the work of the Humane Society of Kawartha Lakes is a meaningful way to express your love, admiration, and gratitude for someone special. Your gift will honour your loved ones, create a lasting tribute to them, and connect both of you through your shared concern for the work of the Humane Society of Kawartha Lakes.

When you make a gift in your Will to the Humane Society of Kawartha Lakes, you can do it in memory or in honour of someone important to you. It will stand as your legacy and your loved one's legacy for generations to come.

### Gifts from Donor Advised Funds

Donor-advised funds (DAFs) are one of the most convenient ways to support a cause you care about while maintaining the flexibility you desire. A DAF is a little like a personal charitable savings account. It allows you to make a charitable contribution (into your DAF account ), receive an immediate tax deduction and then make gifts (recommend grants) over time to your favourite charities – like the Humane Society of Kawartha Lakes.



## Sample of Bequest Language

### (For A New Will)

I hereby give, devise and bequeath [\$ \_\_\_\_\_] OR [\_\_\_\_ % of the residue of my total estate] OR [\_\_\_\_ all of the residue of my total estate] to Humane Society of Kawartha Lakes for its charitable uses and purposes.

## Sample of Codicil Language

### (Amendment to An Existing Will)

This is a codicil to my last will and testament.

I hereby give, devise and bequeath [\$ \_\_\_\_\_] OR [\_\_\_\_ % of the residue of my total estate] OR [\_\_\_\_ all of the residue of my total estate] to Humane Society of Kawartha Lakes for its charitable uses and purposes.

In all other respects I ratify and confirm all of the provisions of my said last Will and Testament dated on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

IN WITNESS\* WHEREOF, I sign, publish and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
(Grantor's signature)

\_\_\_\_\_ residing at \_\_\_\_\_

(Grantor's name)

Witnesses: \*Note that witnesses must not be a beneficiary of the estate, must be over age 18 and must observe the Grantor sign the codicil.

\_\_\_\_\_ residing at \_\_\_\_\_

(\*Witness 1 name)

\_\_\_\_\_ residing at \_\_\_\_\_

(\*Witness 2 name)

# How to Transfer Stocks, Mutual Funds and Securities

To donate your gift of stock, mutual funds or securities to the Humane Society of Kawartha Lakes, please follow these simple steps with Canada Helps.

Visit Canada Helps and fill our online securities donation form. Upon completion, you will receive an email confirming your pledge details.

Complete the provided Letter of Direction form and send it to your financial advisor or investment firm. This authorizes the transfer of shares to Canada Helps on behalf of the Humane Society of Kawartha Lakes.

Once the shares are sold, Canada Helps will send you a confirmation email with your charitable tax receipt and send the funds to the Humane Society of Kawartha Lakes.

If you do not have a Canada Helps account, you can set up one in less than a minute.

Simply visit <https://www.canadahelps.org/en/donate/donate-securities/#why-band> and begin the process.

Please inform the Humane Society of Kawartha Lakes once the transfer has been completed.



For more information about how  
you can leave a legacy, please contact:

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