

BEQUEST BY WILL

a legacy of living



Having and updating a will is something we all need to do. The process of drafting a will creates an opportunity to reflect on what is important to you, and ultimately a will lets you decide where you wish to have the proceeds of your estate directed. For many a will creates the opportunity to “give back” to those who gave them so much, while also providing the opportunity to “invest into the future” of what you care so much about - your family, your community and the organizations that continue to create positive impacts. As you proceed through your chapters of life, your will needs to be updated to ensure it reflects your wishes based on your current situation and goals.

Including a charitable bequest in your will is a simple way to make a lasting gift to your community. When you make this gift through the Ontario 4-H Foundation, your gift is managed so it benefits 4-H forever.

HERE'S HOW IT WORKS

- You include the Ontario 4-H Foundation in your will as a bequest; your lawyer can help you with the recommended language.
- You work with a representative of the Ontario 4-H Foundation to choose how your gift will be recognized and to where the proceeds will be directed. While all funds are pooled for investment purposes, we manage disbursements of annual proceeds on a per fund basis. This allows specific direction and recognition to be easily achieved.
- During the planning meeting(s) we will work with you to determine:
 1. If you wish to establish a fund in your name, in the name of your family, in honour of a person or organization close to you, or in anonymity.
 2. Where you wish to have the annual proceeds earned from your perpetual gift directed. For example, you might wish to direct them generally to one of the Ontario 4-H Foundation's pre-established Pillars of Priority, specifically to a pre-determined use you establish, or to be blended with the proceeds and purpose of another existing fund; and
 3. How your gift will be recognized and the message that will be shared on your behalf (whether in person by a family member or representative or in writing).
- Upon death, we follow the pre-determined instructions and proceed with the investment and management of your legacy.
- Your charitable gift is excluded from your assets for estate tax purposes.
- We handle all administrative details. Your gift will be placed into an endowment that is invested and will grow over time.

