

The Steinbach Community Foundation Inc.

Legacy Estate Planning



Plan now to create a legacy that reflects your life and help our community. For Good. Forever. A legacy gift can support the cause you are passionate about. Choose your cause, how you want to help, and a legacy gift will fulfill your future wishes.

What is a legacy gift?

A legacy gift is a future charitable gift through one or more of the following:

- Will
- Listed appreciated securities
- Life insurance
- Retirement assets (RRSP, RRIF)
- Charitable remainder trusts
- Residual interest

Legacy gifts to The Steinbach Community Foundation Inc. can be directed to an existing fund, or you can create your own endowment fund.

What is an endowment fund?

An endowment fund is like an investment account for the community. Gifts are permanently invested and a portion of the income earned (the spending policy) is distributed every year to local registered charities as grants.

Why make a legacy gift to the Steinbach Community Foundation?

There are a lot of great reasons. You can ...

- Make an impact in your community.
- Honour your values while supporting others.
- Support a cause you care about.

Since endowment funds are permanent, you will help community For Good. Forever.

How to make a legacy gift to The Steinbach Community Foundation Inc.

The most common legacy gift is a charitable gift through a Will (bequest). We are here to help you make sure that

your gift supports what you care about ... because we care about it too!

We will document your instructions carefully to ensure that we use your gift as you intend. You or your lawyer may also wish to have us review any Will wording naming The Steinbach Community Foundation Inc. to ensure we fully understand your wishes and to confirm that we can administer your gift as you prefer. It is essential to remember to provide the lawyer drawing up your Will with the correct name and charitable registration of any organizations named in your Will. The Steinbach Community Foundation's charitable registration number is 89432 2825 RR0001.

Tax Benefits of All Bequests.

Charitable bequests provide for your favorite cause with the potential of greatly reducing taxes owing and helping preserve the value of your estate.

Join us for "Creating Your Legacy". Want to learn more about including a charitable gift in your Will or estate? We hope you can join us for more information at a Creating Your Legacy session in the upcoming year.

These presentations are a great introduction on how you can plan now to create a legacy that reflects your life and helps our community. Learn how easy it is to:

- Leave a bequest for a cause close to your heart
- Create a personal or family legacy
- Give as part of your estate plan (there are tax benefits!)

Contact the SCF office for the next presentation date.

** The above is provided for information only; The Steinbach Community Foundation encourages you to seek guidance from a professional lawyer.*

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