



## Creating Your Legacy

There are two ways to include the Canmore Rotary Club Charitable Foundation in your estate plans, regardless of whether your gift is through your will, a gift of life insurance or other type of arrangement:

1. To provide the Canmore Rotary Club Charitable Foundation with direct assistance to meet its current priorities, consider leaving your gift to the **Canmore Rotary Club Charitable Foundation**. These gifts can be directed to be used for a specific purpose (community, vocational, international or youth projects) or more frequently are left to the **Canmore Rotary Club Charitable Foundation** with flexibility to determine how your gift can best be used to support its mission.
2. If you want to ensure that your gift is added to the Endowment so that the principal may have an effect for years after your gift is realized, consider leaving your gift to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)**. Again you can direct the gift to be used for specific long-term purposes (community, vocational, international or youth projects) or left to the Foundation with flexibility to determine how your gift can best support the **Canmore Rotary Club Charitable Foundation** from year to year. Your gift is invested by the Foundation for use by the **Canmore Rotary Club Charitable Foundation** in the future.

## Leave A Gift In Your Will Sample Language

The following is sample language to provide for the Canmore Rotary Club Charitable Foundation **(OR)** the Canmore Rotary Club Charitable Foundation Endowment Fund in your will.

### Undesignated Bequests

I give and bequeath to the **Canmore Rotary Club Charitable Foundation** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be used as the Canmore Rotary Club Charitable Foundation may deem appropriate.

I give and bequeath to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be used as the Canmore Rotary Club Charitable Foundation may deem appropriate.

## Designated Bequests

Designated bequests may only be directed to the existing funds within the **Canmore Rotary Club Charitable Foundation** or the **Canmore Rotary Club Charitable Foundation (Endowment Fund)**. The funds include community, vocational, international or youth projects.

I give and bequeath to the **Canmore Rotary Club Charitable Foundation** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be added to the (NAME OF THE FUND).

I give and bequeath to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be added to the (NAME OF THE FUND).

### **Power to Vary Clause (please include if Bequest is Designated):**

"In the event that unforeseen circumstances make the specified use of this bequest no longer practical or desirable, the Foundation Board is hereby authorized to make such changes that are in keeping as far as possible with the spirit and general intent of this bequest."

### **Canmore Rotary Club Charitable Foundation information**

Registered name: Canmore Rotary Club Charitable Foundation

Canadian charitable registration number: 863715520 RR 0001

Mailing address: PO Box 8025, Canmore, AB T1W 2T8

For more information, contact **Lawrence Nyman** at the email address or phone number below.

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Website: <https://rotaryclubofcanmore.ca/page/canmore-charitable-foundation>

### **DISCLAIMER**

The Legacy Giving information in this document is provided for general information purposes only. It is not intended as a substitute for professional advice and assistance from your lawyer, financial advisor, or tax consultant. We recommend that you discuss your plans with your lawyer and/or financial advisor before proceeding with a legacy gift.