



Alzheimer *Society*

CANADA

A world without
dementia could
be your gift of
a lifetime.



EVERY 4 MINUTES someone
is diagnosed with dementia

1 MILLION people in Canada
will be living with dementia by
2030, nearly twice the current
number

1 IN 3 people in Canada will
become a caregiver to someone
living with dementia by 2031,
which will almost triple by 2050

You can make an enduring
impact in our shared goal
to end dementia.

Dear friend,

Last spring, I was honoured to join the Alzheimer Society of Canada and its efforts to fund vital, innovative dementia research. Alzheimer Societies across Canada provide vital programs, services and support to people living with dementia, caregivers and families. I'm so thankful to donors like you whose generosity and dedication make all this possible.

If you're like me, at a certain point in your life's journey, you begin to think about how you want to be remembered. What difference can you make? How will you leave your mark on the world? How can you share, with those you love, what your values are in life?

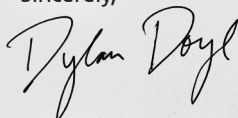
The reality is that the Alzheimer Society of Canada doesn't receive a lot of government funding. Most of what we receive comes from private donations and about one-quarter of that is from the generosity of people who leave a gift in their Will.

Canada is facing a dementia care crisis. With more than half a million people in Canada living with dementia today, the numbers are expected to double in less than 10 years. And they won't be the only ones affected — for every person diagnosed with dementia, at least one other person could be thrust into the role of caregiver. One of our own recent studies suggests that by 2050 a million people will be caring for a family member or friend with dementia — almost triple the number right now.

When it comes to your Will, taking care of your family comes first. That's why many donors choose to designate a percentage of the remainder of their estate as a charitable gift. Doing so doesn't just give many people a sense of satisfaction, knowing they'll be remembered for their generosity. A gift in your Will is also an effective way to reduce taxes on your estate and lessen the financial burden on your family.

I hope it's something you'll consider. If there's anything I can do to answer your questions or concerns, please let me know. I'd be happy to talk with you directly or send information on how you can make the gift of a lifetime.

Sincerely,

A handwritten signature in black ink that reads "Dylan Doyle". The signature is fluid and cursive, with the first name "Dylan" and last name "Doyle" clearly distinguishable.

Dylan Doyle
Manager, Philanthropy and Legacy
Alzheimer Society of Canada

What's Your Legacy?

At the Alzheimer Society of Canada, we want to create a world without dementia. Our research program is helping find ways to prevent dementia as well as improve treatments and care for people living with it – eventually leading to the cures that are so desperately needed. Our programs and services are ensuring people living with dementia and those who care about them have the support and tools they need to live well, based on the most recent scientific evidence.

Our challenge is to change the course of dementia – currently there are no cures, but there is hope. And there is progress.

What would a world without dementia mean to you?

It is a powerful question that we posed to our supporters.

Below are just a handful of their thoughts...



"It would reduce incredible stress that I live with every day. For my loved one, this very clever man with an exceptional memory and knowledge would not have to suffer."

"My husband who is only 64 would have a better, richer, and longer life. We could grow old together."

"It would mean that I would have my beautiful wife back again."

"My mother could enjoy her hard-earned retirement."

"My grandkids could know how wonderful my mother truly is – she would be such a mentor."

Choose the type of gift that's right for you...



A GIFT IN YOUR WILL

Depending on your situation, a gift in your will can take many forms

- **Specific bequest** - a specific amount for your gift
- **Residual bequest** - a percentage of your remaining estate
- **Contingent bequest** - A gift to the society if your named beneficiaries are deceased.



RRSP OR RRIF

You can leave some or all of the funds in your Registered Retirement Savings Plan (RRSP) or Registered Retirement Income Fund (RRIF) to the Alzheimer Society. It's a great way to save on taxes!



A GIFT OF SECURITIES

You can donate stocks, mutual funds or other types of marketable securities. The great news is there is no capital gains tax and you'll receive a receipt for the full amount of your gift.



A GIFT OF LIFE INSURANCE

You can make the Alzheimer Society of Canada the beneficiary of a policy you already own, or you can buy a new policy to donate.

ONLY 20% of families affected by dementia are currently being reached by our programs due to lack of funding

ONLY 30% of research proposals we receive annually can move forward due to lack of funding



This could be the most impactful gift you ever make.

Your generous gift can help fund important research that could turn the tide on dementia and make sure support is available for every person in Canada affected by this ruthless condition.

Your gift of a lifetime can help the Alzheimer Society of Canada:

- Expand our programs and services to support more people living with dementia, caregivers and their families.
- Invest in innovative research looking for ways to prevent, treat and one day cure dementia.
- Improve the quality of life for people living with this condition.
- Stand up for the rights of people affected by dementia.
- Reduce the fear and stigma surrounding dementia.
- Create awareness about the contributing factors of dementia to help people in Canada reduce their risk.



**"I want to help
find a cure for
dementia."**

Caroline and her
husband Laurence

Charitable Will Bequests

Leaving a gift in your Will to the Alzheimer Society of Canada can help ensure we can plan far ahead and achieve our vision: a world without Alzheimer's disease and other dementias.

We are dedicated to supporting those affected by dementia and their caregivers, whilst funding research to find cures. The greatest legacy you can leave future generations is through a gift in your Will to the Alzheimer Society of Canada.



Why consider leaving a gift in your Will to the Alzheimer Society of Canada?

Your gift can bring expert care, support, and advice for the 124,000 people diagnosed with dementia every year, their families, and caregivers. It can also bring hope - because we are committed to funding vital research that one day may lead to cures.

- **CONVENIENT** – Your bequest can be made no matter how old you are and can be for any amount you wish.

- **SIMPLE** – A bequest is easy to arrange. Simply instruct your lawyer to include a bequest to the Alzheimer Society of Canada in your Will or codicil.

- **COST-EFFECTIVE** – There are no extra out-of-pocket costs. Your present income will not decrease.

- **TAX RELIEF** – A Charitable Will Bequest is a highly effective way to reduce estate taxes. The Alzheimer Society of Canada will issue a charitable tax receipt for the full value of your bequest. Your estate will use this receipt to reduce the tax payable on your final tax return. If your bequest exceeds 100% of your net income, the excess may be carried back to the previous tax year.
- **FLEXIBLE** – Your bequest can be for a specific amount, a percentage of your estate, or the residue of your estate – that is a gift after your debts have been paid and other bequests made.
- **CONTROL** – You retain use of the charitable gift asset for the duration of your lifetime.
- **PEACE OF MIND** – You can make changes to your Will at any time.
- **SATISFACTION** – Legacy gifts are made for personal reasons in addition to ensuring that the Alzheimer Society continues leading the fight against Alzheimer's disease and related dementias: via its elite researchers, quality of life improvement, and support programs for care givers. As well, your bequest can create a lasting memorial for you, your family or anyone you may wish to honour.

How it works – ways to give

A charitable bequest in your Will can be in the form of a:

1. **SPECIFIC LEGACY BEQUEST** – a specific sum of money.
2. **RESIDUAL BEQUEST** – a percentage of whatever remains of your estate after gifts to your family are made and any other bequests and expenses are paid.
3. **CONTINGENT RESIDUAL TRUST BEQUEST:** – payable to the Alzheimer Society of Canada after the death of your spouse and/or children.



Sample “Gift in Will” wording

The Alzheimer Society of Canada recommends that you speak with your legal professional to ensure that your Will wording is clear and will result in your wishes being fulfilled without confusion or conflict. To enable the Alzheimer Society of Canada to use designated bequest funds as intended yet accommodate unforeseen program changes, we recommend that your charitable Will bequest include an escape clause.

1. Specific Legacy Bequest:

“My estate trustees shall pay the sum of \$ _____ (or transfer assets with an equal value) to the Alzheimer Society of Canada

The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada.”

2. Residual Bequest:

"My estate trustees shall pay ____% of the residue of my estate to the Alzheimer Society of Canada for the purpose of supporting the highest priority needs as determined by the Society. The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada."

3. Contingent Residual Trust Bequest:

Upon the death of my (wife, husband, partner, etc.) _____ and my (child, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to, the Alzheimer Society of Canada to be used for any purpose(s) approved by the Board of Directors of the Alzheimer Society of Canada."

Your advisor will also need to know the following information:

- **Legal Name:** Alzheimer Society of Canada
- **Charitable Registration Number:** 11878 4925 RR0001



"I left a bequest in my Will to ensure that progress toward better treatments and a cure will continue. I'm so hopeful that a breakthrough will come."

Frequently asked questions

Q

Will a gift in my Will to the Alzheimer Society of Canada take away from my family?

A

You can make your family a priority, as well as support vital programs, services and research at the Alzheimer Society of Canada by designating a portion of the residual of your estate. This means, after your family is taken care of, a percentage of the remaining assets will be gifted to the Alzheimer Society of Canada.

Q

Who can help me leave a gift in my Will?

A

A lawyer, financial advisor or accountant will have the expertise to explain your options and guide you through the process.

Q

Do I need to leave a large gift?

A

Any gift, is greatly appreciated and will be put to great use. You can specify a certain amount or you can designate a portion of your estate. Even a small percentage can have a significant impact.

Give the gift of hope for the future by leaving a Legacy Gift.

If you have any questions or would like additional information, please contact:

Dylan Doyle, Manager, Philanthropy & Legacy

Call: 1-800-616-8816 ext. 2971

Email: DDoyl@alzheimer.ca

Visit: alzheimer.ca/LeaveALegacyGift



Alzheimer*Society*
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