



I788

Fideliter Society

A Forever Kind Of Gift For A Forever Kind Of School

PLANNED GIVING

Overview

What is the Inglis Education Foundation?

When thinking about making a gift to King's-Edgehill School, we ask that you consider making your gift to the Inglis Education Foundation (IEF). The IEF is a legally incorporated foundation created in 2012 that receives and stewards funds for King's-Edgehill School. The IEF's role is to build and protect an endowment that will support Financial Aid and Scholarships for KES Students. As well as monitoring and growing the endowment, the IEF spearheads the School's ongoing relationship with its Alumni. The IEF is designed to steward all planned gifts meant for the use of the School.

What is the 1788 Fideliter Society?

This special society will honour those who have made provisions for a future gift to King's-Edgehill School through a bequest, life insurance policy, annuity, a donation of stocks/securities, a donation of RRSPs/RRIFs/TFASAs, or through another trust arrangement. There are no dues or other obligations, but as a member of the 1788 Fideliter Society, you will be our guest at an annual recognition event, you will receive a certificate of membership, and a special memento. Your name will be listed with other Society members in the KES report, the Alumni magazine, and on the KES website. Again, we thank you for your generous support of the Inglis Education Foundation which exists to support King's-Edgehill School. We look forward to showing our appreciation in more tangible ways through the 1788 Fideliter Society.

Why Consider a Planned Gift?

Planned giving is deciding in advance what happens to your estate when you pass on. Whether it is through a bequest in a will, a gift of TFSA's, RRSP's & RRIF's, life insurance, securities and investments, or memorial donations, a well-planned gift to the IEF guarantees your legacy makes a statement about the things that are important to you while ensuring your family and/or estate can receive tax benefits from such gifts. A planned gift is something everyone can consider regardless of one's age and/or financial situation. Some of the benefits of planned gifts are:

- Tax advantages for your estate (and your beneficiaries)
- The ability to leave a larger donation to the School than may be possible during your lifetime
- The opportunity for your legacy to live on at the School with little or no financial obligation during your lifetime
- A way to affirm the value you place on a KES education by helping future students

The ultimate goal of our planned giving programme is to secure the School's long-term financial foundation while allowing donors a way to demonstrate their love for the School. Have you thought about what your legacy might be?

Please contact Heather Strickey, Director of Advancement, to discuss how your legacy dream can be achieved.

Every tax situation is different and it is strongly recommended that you obtain legal or financial advice before entering into a planned gift arrangement.



Ways to Give

We welcome many types of planned gifts to the IEF. Some of the most common types of gifts include:

CHARITABLE BEQUEST

A charitable bequest is a simple way to distribute assets belonging to your estate through your will. There are several kinds of charitable bequests:

- **General bequests** are gifts that are given for whatever purpose the School deems necessary. These bequests are often made by designating a specific dollar amount, asset, or a fixed percentage of your estate through your will.
- **Specific bequests** are gifts that are to be used for a designated purpose such as funding scholarships and are often made by designating a specific dollar amount, asset, or a fixed percentage of your estate through your will.
- **Residual bequests** allow you to designate the remaining portion of your estate to the IEF after all other obligations of the estate are met.



Advantage

Through charitable bequests, your estate could receive a tax credit that will save taxes for your estate and family. With these tax advantages, you can make a significant charitable gift and both your estate and family will benefit.



RRSPs | RRIFs | TFSAs

Gifts of retirement funds are an excellent way to minimize the significant tax implications for your family and estate. While contributions to these funds are free from taxation when the contributions are initially made, at death, the total value of these assets must be reported as income and are fully taxable to the owner's estate if there isn't a qualifying beneficiary such as the IEF.



Advantage

During your lifetime, you can gift RRSPs/RRIF/TFSAs by designating the IEF as a beneficiary. The asset is transferred to the Foundation, and the estate receives a tax credit to offset the tax from the income. Since the asset passes outside the estate, no probate fees are payable and this results in further savings to the estate.



SECURITIES & INVESTMENTS

The donation of securities or mutual fund shares has become a popular and effective charitable donation option. This is a high potential option both for the amount you can give and the tax benefits you receive. Do you want to make a gift now of stocks and securities that have appreciated significantly? This is a great way to escape the tax implications of appreciated stocks and securities.



Advantage

1. During your lifetime, you can gift your stocks and securities directly to the IEF and you will not pay capital gains on your gift. You also will receive a gift receipt for the full amount of your gift.
2. After your passing, your estate receives a charitable tax receipt for the fair market value of the shares (at the time they are received) and your estate is not required to declare any resulting capital gains on income as long as shares are transferred directly to the IEF and not cashed first.



MEMORIAL DONATION

The passing of a friend, loved one, or pet can be a devastating loss. The donation of a memorial gift to the IEF is an opportunity to remember someone who has touched your life and also celebrate their special bond with our School.



Advantage

Your donation to the IEF in memory of a departed loved one will result in a charitable tax receipt for the value of your donation. Our Advancement and Alumni Department will send a letter on your behalf to the family acknowledging your thoughtful gift.



Should I tell KES that I have left a gift?

Yes. At KES, we would appreciate knowing in advance of your Planned Gift so that we can recognize your generosity and discuss your wishes for how your donation will be used in the future. Also, we would love for you to join our **1788 Fidelity Society**.



*If you are thinking of a gift type that is not listed, please contact:

Heather Strickey

alumni@kes.ns.ca

902-798-2278 ext. 2225

Acts of Giving

Anyone can show their support by leaving a gift in their will and estate plan. We are deeply grateful to our Alumni, Parents, Grandparents, Faculty, and Friends of KES who are choosing a planned gift as their way of giving back to the School.

Jean (O'Neill) Macdonald (STAFF 1946–1958)

Why She Gave



Jean (O'Neill) Macdonald arrived at the Edgehill School for Girls in 1946 and taught until 1954 when she was appointed as the Edgehill Headmistress. She would remain in that position until 1958. Jean married A.G. Macdonald who attended King's

Collegiate School from 1919–

1923. A.G. served on the Board from 1956–1977. Jean remained active with the School in many capacities; however, one of her longest serving positions was as Governor (1977–1992) on the KES Board. When A.G. died in 1997, Jean created a garden around the KES War Memorial in A.G.'s memory. Jean continued to connect with the School by helping with events on the campus, attending the Grade 12/Alumni dinners and reunions, assisting in the Archives, and contributing valuable historical knowledge. Sadly, Jean passed on November 18, 2016 and it was only after her death that we learned that she



had made a gift in her will to the School. The directors of the IEF created the 1788 Fidelity Society for two very pressing reasons. One, the IEF's mission is to steward and grow the endowment fund to ensure that KES Students will be able to attend KES for as long as the School exists. Encouraging KES constituents to make a planned gift is a powerful and effective way to achieve the growth needed to make the fund sustainable. Second, we want to thank our supporters while they are still here to thank! If the IEF does not know about a gift in a will and a donor like Jean passes on, we are denied the opportunity to show our thanks personally. Also, we have lost the opportunity to discuss the donor's wishes on how their thoughtful gift should be used. Please take the opportunity to tell us if you have made a future gift to the School. We want to ensure we fully understand your wishes and, please know that anything you share is confidential.

Pictured above: Jean and A.G. MacDonald

George Rogers

(1969–1971)

Why I Give

If you get the chance to meet George Rogers Jr., you'll immediately be drawn to him. With twinkly eyes and a warm smile, George can tell a funny story while cementing an instant friendship. George serves as a Vice-President and Portfolio Manager with BMO Nesbitt-Burns Inc. and triangulates his time between Calgary, Charlottetown, and Ft. Lauderdale. Although he may cover a lot of distance in the course of a year, he never strays far from his roots. Loyal and passionate about KES, George Jr. has been quietly supporting KES in many ways. Because George loved his time at KES and because so many of his family members had attended, he created the Rogers Family Scholarship to aid families from PEI who want to send their children to KES but require some financial assistance. The Rogers Family Scholarship provides a \$10,000 per year bursary to a student from PEI. When George found out that there were no family members left to continue a scholarship in James Nicholson's memory (James was a young Alumnus who died in Vietnam in 1968 and a friend of the Rogers family), George pledged to keep the James P. Nicholson Scholarship going. Looking to the future, George wants to ensure the longest running independent School remains financially resilient and has made a gift in his will. "I am very happy to give something



back to King's-Edgehill because it played such an important part of my life. It is such a great School and it deserves our support. And the tax laws of Canada today make it a much easier process to make donations." We know that giving to a good cause makes us feel great. However, George's thoughts above also serve to remind us that making a gift in your will to a charitable institution like KES comes with amazing tax-break benefits.



Riley Otto (2006–2013)

Why I Give

Riley arrived at King's-Edgehill School in Grade Nine and "full-nelsoned" his way into our hearts. A gifted wrestler, rugby player, and student leader while at KES, Riley continued to strive for excellence after graduating in 2010. Riley continued to wrestle after graduation and gained a unique perspective on dedication and the pursuit of excellence through the sport of freestyle wrestling. Riley is a seven-time Canadian national champion in the sport, has competed in world championships, and placed third in the Senior Pan-American Championships. In addition to wrestling competitively, Riley also spent the last ten years gaining further education and experience in the financial services industry outside of the province. Riley obtained his Bachelor of Management and Organizational Studies with a specialization in Finance and Administration from the University of Western Ontario. His designations from the Canadian Securities Institute include Chartered Investment Manager (CIM®) and Certified International Wealth Manager (CIWM®). Riley also holds the Certified Financial Planner (CFP®) designation and is an Investment & Wealth Advisor at RBC Dominion Securities.

Riley's love for KES remains strong. He moved back to Nova Scotia in 2020, with his wife, Nicole, and immediately continued his involvement in the wrestling programme at King's-Edgehill School. To further cement his dedication to KES, Riley joined the IEF in November 2020 as a director. Riley has very quickly put his investment and financial background to great use on the Foundation's board. Riley is focused on the future of KES and wants to ensure that the School remains on the solid footing on which it now stands. Riley recently informed the IEF that he has named the Foundation a beneficiary of his life insurance policy.



Riley believes:

"As an Alumnus of King's-Edgehill School who was fortunate to have benefitted from the quality education, support and sense of community that KES has to offer, I know that engaging in a planned giving strategy to help support future generations of students benefit from the same opportunities will have an immeasurable impact on our communities. Seeing my peers and fellow KES Alumni make a real impact through politics, science, academics, sport and business reinforces that enabling young scholars to Be More has an outsized impact on our society as a whole. I'm honoured to be a founding member of the 1788 Fideliter Society, I encourage any of my fellow Alumni in a position to join me in making a planned gift to the IEF to support future generations in receiving the same support that we were fortunate to receive."

Riley's gift emphasizes that we don't have to be in our "golden years" to think about what we want our legacy to be. At any point of time in your life, you can commit to leaving a "forever kind of gift to the forever kind of School."

Pictured above: Alex Otto, Riley Otto, Jason Verryin-Stuart

Julia Strickey (2013–2019)

Why I Give

Julia Strickey loves King's-Edgehill School. She spent the first six years of her life frolicking on the KES campus where she and her family lived. Julia attended KES from Grades 7–12 and like all KES Students, immersed herself in the Athletics, Academics, and Leadership experiences at the School. It was through her experiences as a Cadet leader, Steward, Prefect, and Captain of several sports teams that her leadership skills emerged. It was those leadership skills, honed in the halls, on the fields, on the courts, and in the classrooms of KES that earned Julia the honour of the President's Scholarship from Mount Saint Vincent University. The President's Scholarship covers four years of tuition, residence/meal plan, and books. Julia recently informed the Inglis Education Foundation of the life insurance policy she has signed naming the Inglis Education Foundation as the irrevocable beneficiary of her \$25,000 life insurance policy.

Julia writes, "taking out a life insurance policy was one small way I can show the School what it means to me. I am blessed to have a full scholarship to attend university because I attended a School that gave me opportunities that most students never have a chance to experience. Spending \$52 a month seems like a pretty easy and efficient way to show KES how much it means to me."



It may seem unorthodox for someone as young as Julia to make such a long-term gift; however, at such a young age, the cost to Julia to take out a \$25,000 life insurance policy is minimal. The real question for Julia was "why wouldn't I do this?"

Value of Julia's Policy: \$25,000

Cost of Julia's Policy: \$12,475.20

Gift receipt that Julia can claim: \$5,863.35

True Cost of gift: \$6,611.85

**assuming taxation rules do not change*

Daniel Roukema (1990–1992)

Why I Give

Daniel Roukema (KES 1990–92) has spent the last three decades honing his skills as a seasoned public affairs executive, active nation-builder improving education, and a leader committed to shaping healthier, safer, and greener communities. He is the CEO of MDR Public Affairs Ltd., an international communications and executive management agency devoted to social impact. Daniel has remained active at King's-Edgehill School for more than 20 years. A keen participant at Alumni events in Nova Scotia and Ontario, a current member of the KES Board of Governors, and creator of the Jan S. Roukema Memorial Leadership Award, Daniel values and endorses the IEF, embracing it as a critical ingredient to preserving the School's storied history and legacy of excellence. Daniel Roukema has committed to making an Inglis Education Foundation charitable bequest. "We are yesterday's youth whose paths were paved by the



generosity of generations before us," he says. "It's now up to us to build that roadmap to develop tomorrow's leaders."

Daniel's generosity demonstrates that it is never too soon to think about what mark you wish to leave on the world.



Linder Armitage & Orville Pulsifer

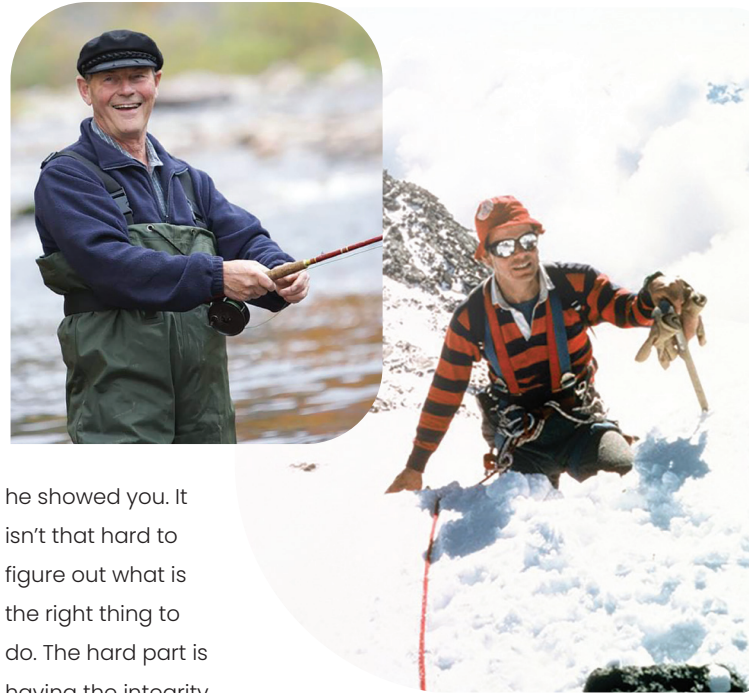
(1948–1952) (1949–1952)

Why We Give

Linder Armitage (1948–52) and Orville Pulsifer (1949–52) met at King's Collegiate School (KCS) in 1949. Theirs is a friendship that has spanned more than 70 years. They reminisce about their life at the School and one name appears often in conversations, Colonel John Hebb (1932–39; 1947–52), KCS Headmaster from 1947–52. Linder and Orville (and many of their peers) credited the amazing teaching, leadership, and integrity of Headmaster Hebb for the path that they would find themselves on in life! Linder and Orville approached the School about creating a scholarship that would honour the late Headmaster John Hebb. Linder, who lives in Calgary, made the financial commitment to get this scholarship off the ground and in May 2016, The Headmaster John Hebb Memorial Scholarship was created. Orville, who lives in Nova Scotia, was crucial to marketing this scholarship. The scholarship is awarded to a Nova Scotian Day Student entering the Junior School who exhibits outstanding academic prowess, athletic achievement, and community involvement.

It is no surprise that Linder and Orville wanted well-rounded students to be chosen annually for this scholarship. A quick look at their yearbook write-ups point to two very versatile and well-rounded young men. Linder's yearbook write-up states, "Linder is the Captain of the Cadet Corps, and President of the Camera Club this year. He is a prefect and a good athlete. Linder has also contributed to the School publications, being gossip editor of *The Courier* and school life editor of *The Windsorian*..." Orville's yearbook write-up claims "OB is a prefect this year, editor-in-chief of *The Courier* and an able managing editor of *The Windsorian*. He is also a tenor in the choir and a capable member of the Cadet Corps."

What was so special about Headmaster John Hebb that his life would inspire two friends to get together and create a scholarship in his memory? Linder recounts, "John Hebb was a wonderful man. He didn't tell you how to live with integrity,



he showed you. It isn't that hard to figure out what is the right thing to do. The hard part is having the integrity and grit to follow

through when you figure out what is the right thing to do. John Hebb's example guides me today. I was hit by a car on a pedestrian crossing in the 2019 and my lawyer suggested that I sue. I thought, 'what would John Hebb think of me capitalizing on an unfortunate woman's mistake.' I told my lawyer that I would not be suing. That is the true legacy of John Hebb. He taught, through osmosis, a cohort of young men how to live with integrity."

Inspired by Linder's initial financial commitment to the scholarship, Orville wants to ensure that The Headmaster John Hebb Memorial Scholarship continues in perpetuity. Orville recently informed the School that he has made the IEF the irrevocable beneficiary of a life insurance policy to help fund the endowed scholarship in Headmaster Hebb's memory. Linder and Orville's commitment to the School to start (and continue in perpetuity) a memorial scholarship is very meaningful way to pay homage to such an important person in their lives.

Pictured above: Orville (left), Linder (right)

RECIPIENT STORIES

Allie Martin (2017–2021)

Why I am Thankful

Allie Martin (2017–21) came to King's-Edgehill School for her Grade Nine year as the inaugural recipient of The Headmaster John Hebb Memorial Scholarship. The scholarship is awarded to a Nova Scotian Day Student entering the Junior School who exhibits outstanding academic prowess, athletic achievement, and community involvement. If anything, Allie “over-filled” these qualifications. In her time at KES, Allie was a perennial member of the Honour Roll, she played a plethora of varsity sports, and she was a leader in all aspects of School life as a prefect, cadet leader, team captain, and head of the Athletics Committee. Allie’s leadership in Athletics extended to representing Nova Scotia at the Canada Games in 2019 in cross country skiing. Allie joined the Saint Mary’s University Womens’ Varsity Soccer programme in the Fall of 2021 as a freshman. Although Allie is an amazing athlete, one should not think she is a “one-trick pony.” Allie was a full diploma International Baccalaureate Student whose marks were simply stunning. Allie also received numerous accolades in the Spring of 2021 for her IB artwork. In fact, Allie was interviewed for print and radio media on her skilled and inventive use of bus tickets to create a multi-media print of Citadel Hill. Allie is quick to recognize that The Headmaster John Hebb Memorial Scholarship she was first offered to enrol at KES allowed her to attend the School which then opened a wide field of interests and opportunities to her. Allie believes that her time at KES was key to garnering



the notice of many fine universities who offered her stellar scholarships. Allie writes, “I would like to give a huge thank you to Mr. Armitage and Mr. Pulsifer for creating The Headmaster John Hebb Memorial Scholarship as it gave me the opportunity to experience KES, which helped develop all of the opportunities I am presented with today.”

RECIPIENT STORIES

Kelsey Jones (2001–2005)

Why I am Thankful

When I was a child, every day before school, my father would ask me to repeat a simple phrase, "I will learn; I must learn; It is imperative." His mantra has guided my life's ambitions, and it was ultimately what led me to apply to King's-Edgehill School (KES). My parents firmly believed that education was the key to rising above one's personal circumstances. So, when I told my parents that I wanted to attend KES, and that I was applying for a scholarship, they were supportive.

KES provided me with the opportunity to become more self-sufficient and grow into the leader I am today. It also gave me the room to explore different interests and cultivate skills outside of academics. While at KES, I played on the women's basketball team. While we weren't winning any championships at the time, playing with a group of phenomenal women was a highlight of my time at KES. I also was interested in music, so I participated in band and the yearly musicals.

After leaving KES, I attended Dalhousie University, and in 2008, I received a Bachelor of Arts with a major in Political Science. I worked as a student support worker for the Chignecto-Central School Board for two years before attending Dalhousie University's Schulich School of Law in 2011. I graduated law in 2014 and became an articled clerk for the Nova Scotia Department of Justice. I was called to the Nova Scotia Bar in 2015; however, immediately after, I had to put my career on hold to care for my terminally ill father. Upon his passing, I was accepted into the Canadian

Barristers' Association Young Lawyers Program, where I was placed at the South African History Archive as an access to information intern in Johannesburg, SA. When I returned to Canada, I took a position at St. Francis Xavier University

(STFX) as the African Descent Student Affairs Coordinator and pursued my Master of Education in administration and leadership at the same time. My past experiences prepared me for my new role as the new director for the Indigenous Black and Mi'kmaq Initiative (IB&M) at Dalhousie University's Schulich School of Law. The IB&M Initiative was established in 1989 to increase the representation of Indigenous Blacks and Mi'kmaq in the legal profession in order to reduce discrimination. Since the IB&M Initiative began, more than 217 Black and Aboriginal graduates have pursued careers with private law firms, Aboriginal and Black organizations, and government legal departments. I am truly honoured to be the director and uphold the IB&M Initiative's 30-year legacy.

Please consider what a gift to the IEF can mean to students who want to be at KES but need financial assistance to be here. Your gift would allow students like Kelsey to attend KES. Joining the 1788 Fidelity Society would demonstrate your love for the School and will allow committed and inquisitive students to attend KES.



Appendix

**Some suggestions of bequest language to give to your lawyer/estate planner/
accountant/financial advisor:**

Legal Name: Inglis Education Foundation

Charitable Registration Number: 891615668 RR0001

For US Donors: Internal Revenue Service Employee Identification No.: 83-3646916

Please contact Heather Strickey for additional information.

General Bequest

"I direct my Trustees to pay or transfer the sum of \$ _____ to the Inglis Education Foundation to be used for the School's general purposes.

Specific Bequest

"I direct my Trustees to pay or transfer the sum of \$ _____ of my estate to the Inglis Education Foundation, and I direct the Foundation to apply such sum towards _____. In the event that circumstances make the specific use of this gift no longer practical or desirable, the Board of Directors of the Inglis Education Foundation are hereby authorized to make changes in its use which remain in agreement with the spirit and general intent of the gift."

Residual Bequest

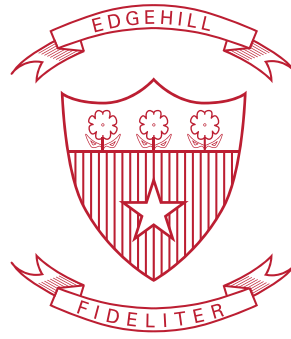
"I direct my Trustees to pay or transfer _____ of such equal shares of the residue of my estate to the Inglis Education Foundation to be used for the School's general purposes.

Discretion to Transfer Shares

"In making any payment to the Inglis Education Foundation pursuant to the provisions of this will, my Trustees may transfer any shares held by my estate in any publicly traded company or corporation in lieu of cash, provided that the shares transferred shall have a fair market value on the effective date of the transfer equal to the amount payable to the charitable institution. In exercising their discretion, my Trustees shall take into consideration the tax benefits, if any, which may be enjoyed by my estate by transferring such shares in *specie*."

*Transferring an asset 'in *specie*' means to transfer the ownership of that asset from one person/company/entity to another person/company/entity in its current form, that is without the need to convert the asset to cash.

Every tax situation is different and it is strongly recommended that you obtain legal or financial advice before entering into a planned gift arrangement.



King's-Edgehill School



KING'S-EDGEHILL SCHOOL

Heather Strickey
902-798-2278 ext. 2225
33 King's-Edgehill Lane Windsor, NS B0N 2T0
alumni@kes.ns.ca

www.kes.ns.ca
