



Lighting up  
tomorrow: donate  
to a brighter future

**PLANNED GIVING**

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# About us



Since 1970, the Father-Menard Foundation, a charitable organization registered under number 861 116 739 RR0001, has been supporting humanitarian projects (health, education, drinking water, etc.) and spiritual formation on three continents, with the aim of creating a fairer, more caring society.

Our mission is to financially support and actively participate in the formation of humanitarian leaders, both religious and lay, in Quebec and elsewhere in the world, and in the development of initiatives aimed at improving people's quality of life in a sustainable way.

*“When you leave for eternity, it's not what you own that counts, but rather what you gave, when you were able to do so.”*

Father Eusèbe-Henri Ménard

# What is a planned gift?

A planned gift is part of proper financial and estate planning. This type of gift is not just for the very wealthy. You can decide to give, either during your lifetime or at the time of your death, a small percentage or a fixed amount of the value of your estate, while leaving enough money to provide for your loved ones.



A planned gift is a gesture of sharing and support that reflects your values of mutual aid, solidarity and sharing, and your vision for the future.



# Why make a planned gift to the Foundation?

- To give hope to the people and communities supported by our projects.
- To help in a more meaningful way a cause that is dear to you.
- To enable your heirs, depending on the type of donation chosen, to benefit from certain tax advantages linked to your estate.
- To obtain attractive tax benefits yourself.



*“I sincerely believe in the work supported by the Father-Menard Foundation, which is why I make regular financial contributions. However, following a recent visit to the Notary, I have decided to plan a gift, in my will, to the Foundation. Although all the Foundation's fields of action are important, I am particularly moved by the construction of drinking water wells in countries that are deprived of them. Water is Life. In fact, I'm sure that by leaving a percentage of my remaining assets upon death, my support will be perpetuated.”*

Nicole F., long-time benefactor

# Types of planned gifts

## Gifts in Wills

It's one of the easiest ways to commit to making a planned gift to the Foundation. You can use your will to bequeath all, part or the residue of your estate. Preparing a will is important, and so is including a properly drafted gift clause. Here is an example of two types of clauses for making a donation to the Foundation:

"I give to the Father-Menard Foundation the sum of \_\_\_\_\_ which will be used to carry out its mission."

"I give to the Father-Menard Foundation \_\_\_\_ % of my estate to support the said organization in carrying out its mission."

## Gift of a life insurance policy

To secure the Foundation's future, you can make a major gift through your life insurance policy. This can be an existing policy or a new policy taken out for this purpose. The Foundation then becomes the beneficiary. You can write, for example:

"I designate the Father-Menard Foundation as beneficiary of the income from the life insurance policy I have taken out on my life with the company \_\_\_\_\_ and bearing the number \_\_\_\_\_, regardless of any revocable beneficiary designation that may appear on this policy and notwithstanding any other provision of the present will."





## Gifts of Stocks and Securities

Donating securities (stocks, bonds, etc.) is one of the most tax-efficient ways of doing so. The government has eliminated capital gains taxation when securities are transferred to a registered charity. To qualify for an attractive tax credit, it's best to transfer the securities electronically from the brokerage account to the Father-Menard Foundation's account, rather than donating the proceeds. Once the donation has been made, the Foundation will immediately issue a donation receipt for the fair market value (FMV) of the securities.

The greater the capital gain, the more advantageous the gift of securities!

## Endowment funds

You can establish an endowment fund in your own name or that of a loved one. Only the income generated will be used by the Father-Menard Foundation, which will then be able to count on long-term resources. Funds created in this way will always be identified as such in our financial statements. You can also choose to allocate the income from your fund to further the Foundation's mission, or to a project of your choice.

# Tax benefits

## Calculation exemple


Let's take the example of an average estate of \$500,000. What would happen if you left a small portion of your estate - 5% - to the Father-Menard Foundation? This small percentage would be the equivalent of a \$25,000 donation. Imagine what could be accomplished with a donation of this magnitude!

What's more, your gift in your will will significantly reduce the taxes payable by your estate after your death. With a gift of \$25,000, your estate will benefit from a donation tax credit. For example, on a taxable income of \$100,000, the tax payable by the estate is reduced by \$12,500:

	No legacy to the FPM	With legacy to the FPM
Estate taxable income	100 000 \$	100 000 \$
Tax payable (50%)	(50 000) \$	(50 000) \$
	50 000 \$	50 000 \$
25,000 donation tax credit	0 \$	(12 500) \$
<b>Estate tax payable</b>	<b>50 000 \$</b>	<b>37 500 \$</b>




This table is a simulation for information purposes only. In all cases, we recommend that you consult a specialized professional who can analyze your personal financial situation.



Every year, the Father-Menard Foundation receives planned gifts. With this gesture, donors wish to contribute to the advancement of projects that are dear to their hearts in the fields of water, health, education and faith. Since 1970, their support has enabled us to pursue our mission of humanitarian aid and spiritual formation, while providing us with the means to better plan our future.

We recommend that you contact your notary, lawyer, accountant or financial advisor to find out which type of planned gift is best for you, depending on your situation. The Foundation can also assist you in this process, in complete confidentiality, by referring you to competent professionals. For more information, please contact us by phone or e-mail.



The Father-Menard Foundation is a registered charity under number 861 116 739 RR0001.

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