

# Legacy Giving: Making a Lasting Impact

Thank you for taking the time to learn about legacy giving and how it can secure the future of our church and its ministries. This pamphlet provides an overview of the key points discussed in the presentation, along with additional information to guide you in meaningful conversations with prospects.

## Why Legacy Giving Matters

Legacy gifts play a vital role in ensuring the sustainability of our church's mission. They enable us to:

- Continue vital programs and expand our impact.
- Support future generations in discovering their faith.
- Strengthen our community and its ministries.

## Types of Legacy Gifts

There are many ways to leave a legacy gift:

- **Bequests:** Designate a specific amount or percentage of your estate in your will.
- **Life Insurance Policies:** Name the church as a beneficiary.
- **Retirement Accounts:** Include RRSPs, RRIFs, or TFSAs.
- **Securities and Stocks:** Avoid capital gains taxes while supporting the church.
- **Cash or Endowments:** Provide immediate or long-term flexible support.

## Tax Benefits of Legacy Giving

Legacy giving offers significant tax advantages:

- Receive charitable tax receipts for estate gifts.
- Reduce taxable income for your estate.
- Avoid capital gains taxes on donations of securities or stocks.
- Maximize the impact of your gift while reducing the tax burden.



## Flexible and Contingency Planning

We encourage donors to include flexibility in their legacy gifts. For example:

- Specify alternative uses if the designated program no longer exists.
- Allow funds to support similar purposes in the future.

This ensures that the donor's values and intentions are upheld, even as needs evolve.

## Recognizing Legacy Donors

We are deeply grateful for every legacy gift. Donors can choose to:

- Be recognized as members of the Legacy Society.

## How to Engage Prospects

When discussing legacy giving, focus on:

- The lasting impact of their gift on their church's mission.
- Real-life stories of how legacy gifts have made a difference.
- The flexibility and tax benefits of planned giving.

Be ready to provide additional resources and answer questions.

## Next Steps for Prospects

Encourage prospects to:

1. Reflect on their connection to their church and its importance in their lives.
2. Discuss legacy giving with their family and financial advisors.
3. Contact us for more information or to explore giving options:

**Email:** [tamara@philanthropica.ca](mailto:tamara@philanthropica.ca)

**Phone:** 1-514-244-0705

## Thank You

We are grateful for your dedication and willingness to share the importance of legacy giving. Together, we can ensure the future of our church and its mission for generations to come.

