

Please send me more information on

- Bequests
- Charitable remainder trusts
- Gifts of annuities
- Gifts of life insurance
- Gifts of retirement plans
- Endowments

I have already arranged a gift in my estate to the Alzheimer Society.

Name \_\_\_\_\_

Address \_\_\_\_\_

City/Town \_\_\_\_\_ Province \_\_\_\_\_

Postal Code \_\_\_\_\_ Telephone \_\_\_\_\_

Email \_\_\_\_\_

Information contained in this brochure is not intended as specific financial planning or legal advice. You should always consult your legal advisors, financial planners and family members when considering a legacy gift.

Alzheimer Society

Please complete and mail or fax this card to:

Charitable registration number: 11878 4925 RR0001

## Thank you

Thank you for considering a gift to the Alzheimer Society. We would be happy to help you learn about all the ways you can give, but we do not provide specific legal or financial advice. For help in preparing your gift, please consult a qualified professional.

## Circle of HOPE

The Circle of Hope honours dedicated friends who have planned a legacy gift to the Alzheimer Society. Becoming a member of the Circle of Hope is simply a matter of letting us know that you have made the decision to support us. We do not need to know the specific details.

You can, of course, choose to remain anonymous, but by allowing us to honour you publicly in ways that suit you, we hope that other supporters will be inspired to make a legacy gift as well.

## Make dementia a distant memory. Leave a legacy of hope for the future, today.

Alzheimer's is a disease of the brain. It erases memory, steals the ability to think, and makes simple tasks impossible. It robs independence and eventually, takes life.

Today, 747,000 Canadians are living with Alzheimer's disease and other dementias. In less than 20 years, this number will reach 1.4 million. With the increasing prevalence of Alzheimer's disease, more and more family members will be directly impacted as caregivers.

The Alzheimer Society has a vision: a world without Alzheimer's disease and other dementias. We offer Help for Today through our programs and services for people living with dementia and *Hope for Tomorrow...* by funding research into finding the cause and a cure.

Help us make Alzheimer's disease a distant memory. Leave a legacy of hope for the future today.

The Alzheimer Society is Canada's leading nationwide health charity for people living with Alzheimer's disease and other dementias. Active in communities right across Canada, the Society

- Offers information, support and education programs for people with dementia, their families and caregivers
- Funds research to find a cure and improve the care of people with dementia
- Promotes public education and awareness of Alzheimer's disease and other dementias to ensure people know where to turn for help
- Influences policy and decision-making to address the needs of people with dementia and their caregivers.

Help for Today. Hope for Tomorrow...<sup>®</sup>

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Alzheimer Society

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 Twitter: twitter.com/AlzSociety

Charitable registration number: 11878 4925 RR0001

Alzheimer Society

LEAVING A Legacy  
Invest today for hope tomorrow



## Planning today to offer hope for the future

Leaving a gift in your estate makes a bold statement about your life, and offers a glimpse into how you will be remembered well into the future. It may also be a way for you to make a gift larger than you ever imagined.

You can choose the causes and organizations that are closest to your heart now and arrange to support them right away or later through your estate. By planning ahead, you can make a lasting gift that may also help you influence your future income, your current tax position and the size of your estate.

All gifts, large or small, are important; all make a difference.



## Bequests

A bequest in your Will can create a lasting legacy to continue your tradition of annual gifts. You can:

- Give cash, an asset or a share of whatever remains after estate expenses and other bequests are paid.
- Set up a trust that pays income to a loved one for life with a gift of the remainder to the Society.
- Make your gift contingent, payable only if your other beneficiaries do not survive you.



## What your Will means to you

Along with protecting your family's future, your Will can be a tribute to the principles and values that you have upheld in your life.

Without a Will, your provincial government decides how your assets will be divided. Creating a Will is the single most important step you can take to ensure that your final wishes will be carried out.

## Gifts of life insurance

You can plan a generous gift and receive tax benefits now or in the future. For example, you can:

- Designate the Alzheimer Society as a beneficiary on a policy you own. The Society will receive a future gift and your estate will receive a tax benefit.
- Transfer ownership of a new or existing policy to the Alzheimer Society. The Society will receive a future payout from the policy and you will receive tax benefits during your lifetime.

## Gifts of annuities

Annuities allow mature donors to make a significant gift and still have enough income to live comfortably. They offer a rate of return higher than GICs and term deposits, without increased investment risk, and without the need to make ongoing investment decisions.

If you find these advantages appealing and you are interested in making a donation to the Alzheimer Society, combining a charitable gift with an annuity might work well for you.

## Gifts of securities

A gift of public securities such as stocks, bonds or mutual funds can be a tax efficient way to make a gift to the Alzheimer Society. Currently, you will pay no tax on the capital gain, but still receive a donation receipt for the fair market value of the securities.

Securities are equally effective when given today or in the future through a bequest in your Will.

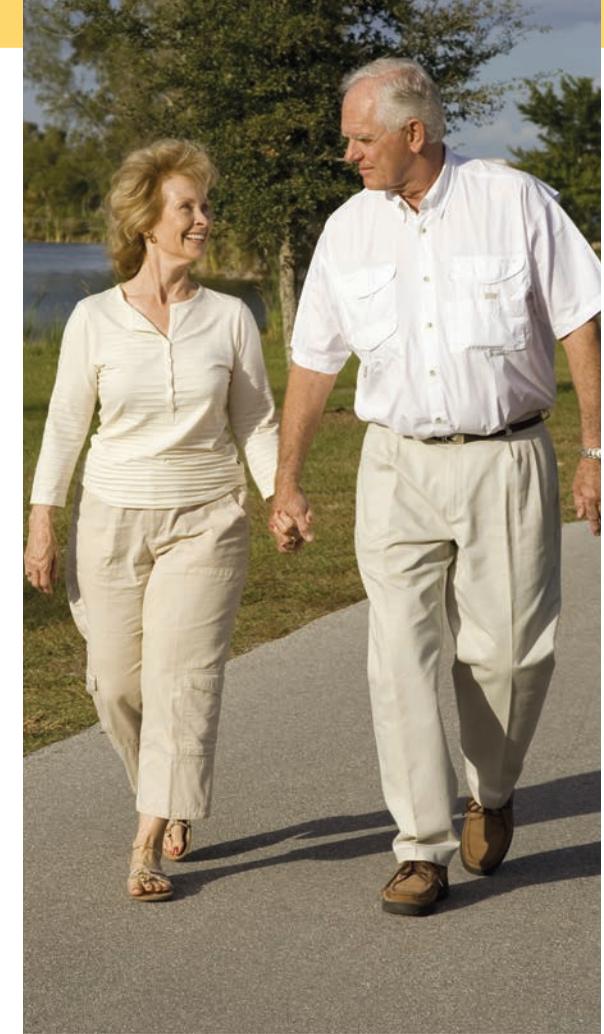
## Gifts of retirement plans

One of the easiest ways to help people living with Alzheimer's disease and related dementias is to designate the Alzheimer Society as a beneficiary of your RRSP or RRIF. This valuable future gift to the Society will offset income tax that your estate or your spouse's estate will eventually pay on these assets.

## Endowments

When you create an endowment, the principal amount of your gift is invested and only the income can be used for our vital programs and research. With this type of gift that continues to give year after year, you offer a perpetual source of hope for those living with Alzheimer's disease and related dementias. Various tax benefits apply, depending on the way the donation is made.

You can be confident that your gift will improve lives, and that its value will be maximized over time by a respected investment management group, guided by the policies of the Alzheimer Society.



## Charitable remainder trusts

Charitable remainder trusts and gifts of residual interest allow donors to receive an immediate tax benefit and continue to enjoy the benefit of their property during their lifetimes. These gifts often appeal to mature donors who would like to continue receiving an income from their assets or enjoying their property, and are interested in reducing the amount of income tax they pay.