

# A GIFT IN YOUR WILL

**A will is the easiest and most effective means to ensure that you fully provide for your family and your assets are distributed as you wish.**



If you already have a will, you are on the right track; you obviously understand the value of having a well planned estate. A will makes it much easier for your loved ones to receive the money and cherished possessions you leave behind.

Should you decide to leave a gift to the Alzheimer Society of Nova Scotia in your will, please let us know. We can help with the wording of the clause, discuss the impact of your gift, and review various options to ensure that your wishes are carried out as you intend.



## BENEFITS TO YOU:

- ✓ A gift in your will is a cost-effective way to establish a meaningful donation to the Alzheimer Society of Nova Scotia while maintaining financial security during your lifetime.
- ✓ A gift in your will is a tax-effective means of supporting the Alzheimer Society of Nova Scotia. Your estate may claim the full amount of the gift in the year that it is made, in a prior year of the estate, in the year of your death, or in the year prior to your death, or it can be carried forward five years in the estate (if it continues to exist).
- ✓ A gift in your will can be changed if your priorities or financial situation changes during your lifetime.
- ✓ A gift in your will is a lasting testimony and a way to fulfill your personal wishes for those living with Alzheimer's Disease in Nova Scotia, their family members and caregivers as they navigate the journey.

## ESTABLISHING A GIFT IN YOUR WILL

You can choose several ways to make a gift in your will. Your financial and legal advisors can help you choose a strategy that best suits your circumstances and goals while realizing optimum benefits. You might choose to:

- Instruct that the Alzheimer Society of Nova Scotia receive a percentage or the whole of the residue of your estate. Residue is what is left of your estate after taxes, debts, legal obligations, and testamentary fees are paid. The following phrase might be used: "Following payment of specific bequests, taxes, debts, and other obligations, I leave the residue of my estate (or percentage of) to the Alzheimer Society of Nova Scotia."
- Name a specific amount. For example, "I leave the Alzheimer Society of Nova Scotia the sum of \$\_\_\_\_\_".
- Leave all or a portion of your estate to the Alzheimer Society of Nova Scotia only if your chosen beneficiaries predecease you. For instance, you might say: "If my chosen beneficiaries predecease me, I hereby instruct that my estate (or percentage of) be left to the Alzheimer Society of Nova Scotia."



You will need the proper legal name, address, and Charitable Registration Number of the Alzheimer Society of Nova Scotia.

### **Alzheimer Society of Nova Scotia**

Charitable registration number:

10670 5379 RR0001

112 - 2719 Gladstone Street

Halifax Nova Scotia B3K 4W6

**Without a will, provincial laws determine who receives what. If you do not have blood relatives, it is likely your provincial government will receive your estate, instead of friends or causes you wish to benefit. By preparing a will you decide how your estate is distributed.**

**Thank you for considering the Alzheimer Society of Nova Scotia in your plans.**

We recommend you discuss your gift intentions with your own financial, legal, and/or tax advisor. When you are ready to proceed, we would be pleased to work with you to develop a gift which is meaningful to you and will bring maximum benefit to Nova Scotians living with dementia.

*For questions and more information please contact:*

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