



AlzheimerSociety

A world without
dementia could
be your gift of
a lifetime.

Charitable Will Bequests

Leaving a gift in your Will to the Alzheimer Society of Canada will help ensure we can plan far ahead and achieve our vision: a world without Alzheimer's disease and other dementias.

We are dedicated to supporting those affected by dementia and their caregivers, whilst funding research to find a cure. The greatest legacy you can leave future generations is through a gift in your Will to the Alzheimer Society.

Why consider leaving a gift in your Will to the Alzheimer Society?

Your gift will bring expert care, support, and advice for the 124,000 people diagnosed with dementia every year, their families, and caregivers. It will also bring hope - because we are committed to funding vital research that one day may lead to a cure.

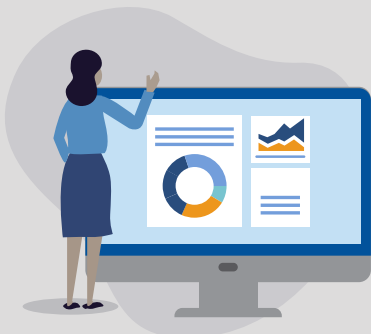
- **CONVENIENT** – Your bequest can be made no matter how old you are and can be for any amount you want.
- **SIMPLE** – A bequest is easy to arrange. Simply instruct your lawyer to include a bequest to the Alzheimer Society of Canada in your Will or codicil. You can specify which chapter you would like to support: our national office, provincial office, or a local office.
- **COST-EFFECTIVE** – There are no extra out-of-pocket costs. Your present income will not decrease.
- **TAX RELIEF** – A Charitable Will Bequest is a highly effective way to reduce estate taxes. The Alzheimer Society will issue a charitable tax receipt for the full value of your bequest. Your estate will use this receipt to reduce the tax payable on your final tax return. If your bequest exceeds 100% of your net income, the excess may be carried back to the previous tax year.
- **FLEXIBLE** – Your bequest can be for a specific amount, a percentage of your estate, or the residue of your estate – that is a gift after your debts have been paid and other bequests made.

- **CONTROL** – You retain use of the charitable gift asset for the duration of your lifetime.
- **PEACE OF MIND** – You can make changes to your Will at any time.
- **SATISFACTION** – Legacy gifts are made for personal reasons in addition to ensuring that the Alzheimer Society continues leading the fight against Alzheimer's disease and related dementias: via its elite researchers, quality of life improvement, and support programs for care givers. As well, your bequest can create a lasting memorial for you, your family or anyone you may wish to honour.

How it works – ways to give

A charitable bequest in your Will can be in the form of a:

1. **SPECIFIC LEGACY BEQUEST** – a specific sum of money.
2. **RESIDUAL BEQUEST** – a percentage of whatever remains of your estate after gifts to your family are made and any other bequests and expenses are paid.
3. **CONTINGENT RESIDUAL TRUST BEQUEST:** – payable to the Alzheimer Society after the death of your spouse and/or children.



Designations

In addition to our general programs and services, gifts to Alzheimer Society can be designated to our Research Program. For additional options, we would be pleased to discuss our programs with you.



Sample “Gift in Will” wording

The Alzheimer Society recommends that you speak with your legal professional to ensure that your Will wording is clear and will result in your wishes being fulfilled without confusion or conflict. To enable the Alzheimer Society to use designated bequest funds as intended yet accommodate unforeseen program changes, we recommend that your charitable Will bequest include an escape clause.

1. Specific Legacy Bequest:

“My estate trustees shall pay the sum of \$ _____ (or transfer assets with an equal value) to the Alzheimer Society of Canada, for the purpose of supporting: (select one)

- a) The Alzheimer Society Research Program
- b) Dementia Support Programs and Services

The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada.”

2. Residual Bequest:

"My estate trustees shall pay ____% of the residue of my estate to the Alzheimer Society of Canada for the purpose of supporting the highest priority needs as determined by the Society. The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada."

3. Contingent Residual Trust Bequest:

Upon the death of my (wife, husband, etc.) _____ and my (son, daughter, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to, the Alzheimer Society of Canada to be used for any purpose(s) approved by the Board of Directors of the Alzheimer Society of Canada."

Your advisor will also need to know the following information:

- **Legal Name:** Alzheimer Society of Canada
- **Charitable Registration Number:** 11878 4925 RR0001



"I left a bequest in my Will to ensure that progress toward better treatments and a cure will continue. I'm so hopeful that a breakthrough will come."

Frequently asked questions

Q Will a gift in my Will to the Alzheimer Society take away from my family?

A You can support your family, as well as support programs and research by designating a portion of the residual of your estate. This means, after your family is taken care of, a percentage of the remaining assets will be gifted to the Alzheimer Society.

Q Who can help me leave a gift in my Will?

A A lawyer, financial advisor or accountant will have the expertise to explain your options and guide you through the process.

Q Do I need to leave a large gift?

A Any gift, large or small, is greatly appreciated. You can specify a certain amount or you can designate a portion of your estate. Even a small percentage can have a significant impact.

Q How will the Alzheimer Society manage my gift?

A Your gift is valuable and we will handle it efficiently and wisely. You can designate your donation to go towards dementia research or to programs and services aimed at improving the lives of people affected by dementia.

Give the gift of hope for the future by including the Alzheimer Society in your Will

If you have any questions or would like additional information, please contact:

Dylan Doyle, Manager, Philanthropy & Legacy

Call: 1-800-616-8816 ext. 2971

Email: DDoyl@alzheimer.ca

Visit: alzheimer.ca/GiftInYourWill



Alzheimer Society