



A Gift in Your Will (Testate)

Leaving a Legacy gift is a very personal decision – create an Estate plan that reflects your values, your relationships and your story. Leave a significant future gift for St. Joseph's Villa Foundation, Dundas without effecting your investments today.

Types of Gift by Will:

- Specific Bequest - an outright gift of money or property
- Residual Bequest - a percentage or share of the value of your estate after all debts and taxes have been paid
- Contingent Bequest - a gift dependent on the occurrence of another event i.e., the death of a spouse
- Testamentary Trust - established in a Will for the purpose of directing assets (i.e. stocks / securities) immediately and directly to your named beneficiaries which can include family and or charity

No gift is too small to leave a lasting impact on our Campus of Care.

Benefits of Donating a Gift in your Will

- Peace of mind knowing your plans are in place.
- Legacy gifts receive a charitable donation receipt in the name of the estate and can help reduce the tax burden for your beneficiaries.
- You can choose how you wish to be recognized

By exploring different strategies for giving through your estate, and discussing them with your financial advisor, you can ensure that you are getting the maximum tax benefit from your philanthropy while helping the charities that you care for dearly.