

Making a Bequest



United Way
Winnipeg

Tomorrow Fund

United Way of Winnipeg's Endowment Fund

TYPES OF GIFTS

A bequest in a will is fully revocable during your lifetime. It is yours to control. Your bequest can be as simple as a sentence or two in your will. For example, your bequest may specify:

- A certain sum of money: “I give to United Way of Winnipeg the sum of \$____,”
- A particular asset: “My shares of XYZ stock,”
- A portion of your remaining estate after other bequests have been paid: “50 per cent of the rest, residue and remainder of my estate,”
- RRSPs, RRIFs and insurance policies may be left directly to United Way of Winnipeg by naming United Way of Winnipeg as beneficiary.

Should your wishes or circumstances change, you can easily make revisions at any time, simply by adding a codicil to your existing will or drafting a new will.

REMEMBER:

All these options will provide tax benefits for most people. Upon your death, your estate is entitled to a donation receipt for the full value of your bequest. This provides a significant tax credit which may be used on your final tax return.

For example: If you leave \$10 000 to United Way of Winnipeg and the remainder to your spouse or children, your bequest results in tax savings of up to \$4650.



A BEQUEST IS A GIFT FROM THE HEART

If you write a will, you have power. Power over the distribution of the wealth and worldly possessions - large or small – you've accumulated during your lifetime. You determine how you will provide for your loved ones. Your decisions help ease the transition of your passing for the family and friends you leave behind.

When you include United Way of Winnipeg in your will, you are using that power to create opportunities for a better life for everyone. It is a gift from the heart that will continue to support United Way's efforts for generations to come.

THE TOMORROW FUND

Bequests are invested in the Tomorrow Fund, United Way of Winnipeg's endowment fund. A portion of the investment income is retained annually to ensure the real value of the capital is maintained. The balance of the investment income supports United Way's work by:

- Helping children and youth achieve their potential
- Promoting financial stability and independence
- Improving neighbourhood health and personal well-being

Launched in 1990, a gift to the Tomorrow Fund provides you with the opportunity:

- To invest in generations to come
- To continue your annual giving in perpetuity
- To provide a personal long-term legacy to the community
- To create a Named Fund with a one-time or accumulated gift of \$5000 or more

UNITED WAY IS HERE TO HELP YOU

When you decide to make a bequest to United Way of Winnipeg, we are ready to help. At your request, a United Way representative will meet with you – and your lawyer if you wish - to discuss your intentions.

Once you have completed your will and included a provision for United Way of Winnipeg, please let us know so we can express our gratitude.

With your permission, and as a way of encouraging others to consider a bequest, we will list your name among the growing number of people who have left gifts to United Way of Winnipeg as members of our Legacy Circle. Or, if you prefer, we will keep your intentions confidential.



A GIFT TO UNITED WAY OF WINNIPEG

Winnipeg's history is filled with stories of men and women who had a vision for tomorrow. Every day, we enjoy the fruits of their vision and hard work. Despite knowing they would never witness all their dreams come to pass, these special people continued in the knowledge they were investing in the future.

United Way of Winnipeg addresses issues Winnipeggers feel are most important. In turn, the Tomorrow Fund provides stable resources to help fuel our vital work. We welcome and need generous gifts that demonstrate a caring commitment to the continued health and well-being of our community. Winnipeg needs people willing to invest in future generations.

A gift to United Way of Winnipeg in your will provides tax benefits as well as the opportunity to leave your legacy in the community and continue your support of United Way in perpetuity.

**Creating
Opportunities for
A Better Life
for Everyone**

BROCHURES IN THIS SERIES:

- Preparing a Will
- Making a Bequest
- Making a Gift of Life Insurance
- Creating a Charitable Remainder Trust
- Making a Gift of Appreciated Securities

For more information about the Tomorrow Fund or leaving a bequest, or to inform us of a gift in your will, contact United Way of Winnipeg at:

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NOTE:

The purpose of this publication is to provide general information, not to render legal advice. Any changes in the tax legislation may affect the examples listed in this information. You should consult your own lawyer or other professional advisor as to how this may apply to your situation.

