

LEGACY GIVING GUIDE



A gift in your Will can transform your community.
Let us help.



FORMATION: Equip the Saints

WELCOME

“Each of you should give what you have decided in your heart to give, not reluctantly or under compulsion, for God loves a cheerful giver. And God is able to bless you abundantly, so that in all things at all times, having all that you need, you will abound in every good work.” 2 Corinthians 9:7-8.

Leaving a gift in your Will is a profound expression of your **love, compassion,** and **hope for the future.** How you choose to direct your financial legacy reflects the values you cherish and the meaningful life you’ve created.

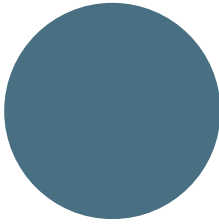
By including **Your Parish** in your estate planning, you will help support and nurture our faith community. Your generosity can create a lasting legacy, ensuring that the Church’s mission and outreach continue to flourish, bringing positive changes to those in need both now and in the years to come.



YOUTH SUMMIT: Eucharistic Congress

WAYS TO LEAVE A LEGACY GIFT

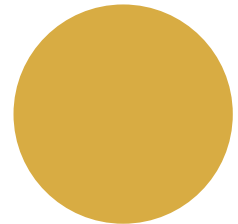
Charitable Will Bequest



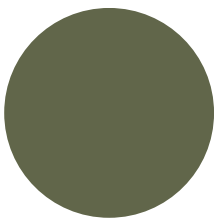
Name **Your Parish** as a beneficiary in your Will and know that your legacy will live on for generations. All it takes is a simple clause. In addition, a tax receipt for the full amount of your donation will be issued and may offset capital gains or other taxes payable to lessen the financial cost on your estate. For help with clause wording, contact **Jennifer Deane at 902-429-9800 ext. 125.**

Securities

A gift of securities is a financially sound way to support **Your Parish's** mission. Donating stocks, mutual funds or other types of marketable securities to a charity exempts you from paying tax on capital gains. You will also get a tax receipt for the full amount of the gift.



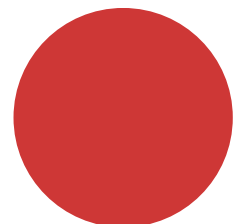
Life Insurance



Gifts of life insurance are a great way to make a substantial donation for the relatively low cost of the premium payments. You can donate a policy you already own, make **Your Parish** the beneficiary of a joint policy held with your spouse, or buy a new policy to donate.

Retirement Funds

Retirement funds are likely among the most heavily taxed assets you own. Naming **Your Parish** as a beneficiary can be an effective way of creating a tax-smart estate plan. By doing so you retain ownership of the funds, receive a tax receipt for the full amount donated, avoid probate fees, and reduce your estate taxes.



REASONS TO CONSIDER A LEGACY GIFT

Tax Relief

Making a gift in your Will is simple and you still retain control of your assets.

You can bequeath cash, securities, property or even a percentage of your estate. Your estate receives a charitable tax receipt that can decrease (or even eliminate) estate taxes.

Equip Your Parish

Our parishes rely on the charitable giving of their parishioners to sustain and grow their ministries.

“Give, and it will be given to you. A good measure, pressed down, shaken together and running over, will be poured into your lap.” -Luke 6:38

Your gift ensures the mission of **Your Parish** thrives now and for years to come.

Peace of Mind

You can change your Will at any time but knowing it is complete provides peace of mind.

You can complete a Will at any age.

You can leave a gift for any amount.



This information does not take the place of financial, legal or tax-related advice. It is essential that you consult a lawyer, qualified accountant, or financial advisor before finalizing this important process.

COMMUNITY: Gate of Heaven, Cemetery Mass





MISSION: Emergency Shelter Project

STEPS TO LEAVE A LEGACY GIFT

Leaving a legacy doesn't have to be complicated.

1. Make a Plan

- The Archdiocese of Halifax-Yarmouth offers free and confidential resources to help you create a plan for your Will that reflects your life, faith, and values. There is no obligation, and we assure you that no one will attempt to sell you anything. **Contact Jennifer Deane at 902-429-9800 ext. 125 or email jdeane@halifaxyarmouth.org for our free and confidential resources.**

2. Speak to your professional advisors

- Experts can give you knowledgeable advice on how to go about leaving a legacy. Talk to your trusted professionals so you can get started down the right path.

3. Update your Will

- Decide whether you want to leave a percentage or a specific amount of your estate to the **Archdiocese of Halifax-Yarmouth** or **Your Parish** and update your Will with your legal advisor.

Sample Clause:

I give, devise and bequeath to the [Archdiocese of Halifax-Yarmouth and/or Your Parish Name], Registered Charity No. [119109833 RR 0006 or Your Parish No.], ___% of the residue of my estate to be used for any purpose(s) that the charity chooses for the fulfilment of its objectives.

Contact Jennifer Deane 902-429-9800 ext. 125 for your parish's unique Registered Charity Number.



WORSHIP: Chrism Mass

FREQUENTLY ASKED QUESTIONS

Do I need to have a large estate?

No, absolutely not. You can specify any amount you wish in your Will, knowing that all of the funds will be used effectively. Even a small percentage of your estate can have a significant impact in **Your Parish**.

Who can help me make a legacy gift?

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

We're here to help! Please contact us if you have any questions.

Development Coordinator, Jennifer Derwey-Deane

Email: development@halifaxyarmouth.org Phone: (902) 429-9800 ext. 125

www.halifaxyarmouth.org

Charitable Giving in Your Will: A Quick Worksheet

Section 1: Personal Information

Full Name:

Address:

Phone Number:

Email Address:

Section 2: Identifying Your Charitable Interests

What causes or ministries are you passionate about?

Name **Your Parish** or other charities you'd like to support:

Section 3: Your Assets

List your main assets that could be included in your Will:

- 1.
- 2.
- 3.

Section 4: Types of Gifts

Consider the type of gift you'd like to leave. Check one or more options:

- A specific dollar amount: \$_____
- A percentage of my estate: _____%
- A specific asset (e.g., stocks, property): _____
- Residual gift (what remains after other bequests are made)

Section 5: Next Steps

Have you consulted with an estate planning attorney? Yes No

Have you informed the charity about your intent to leave a gift? (Optional)

Yes No

Section 6: Contact for Assistance

If you have questions about including a parish or the diocese in your Will, contact:

Archdiocese of Halifax-Yarmouth, Jennifer Deane, Development Coordinator

Email: jdeane@halifaxyarmouth.org Ph: 902-429-9800 ext. 125

The information is for your use only. Please do not return any portion of this document to Your Parish or the Archdiocese of Halifax-Yarmouth.