



The Diocese of Edmonton

Planned Giving Office

Bequests to the Church

In lieu of a Quarterly Report, I offer the following thoughts about charitable bequests:

Bequests

- A charitable bequest is a tax-effective way to help your church thrive beyond your death, whether you leave money to your parish, the Diocese, or the Anglican Church of Canada.
- Your estate may claim donations in the year of death equal to 100 percent of your net income in that year and in the prior year. Your estate may use the resulting tax credits to offset taxes owing due to the disposition of property at death.
- You continue to use your assets while you are alive to enjoy them.
- Your estate can fulfil a charitable bequest by transferring publicly traded securities to your church which eliminates capital gains in the year of death from the securities that are donated. You may direct that a specific number of shares be gifted, or provide your Executor with discretion to transfer securities to fulfil a residual or legacy gift.

Arranging your Bequest

- There are several types of charitable bequests. You may make: a specific bequest, a residual interest gift, a contingent bequest or a bequest subject to the terms of a trust. Your legal and financial advisors can help you make arrangements that best suit your circumstances.
- You can designate your bequest for a particular purpose or make an undesignated bequest. Designated bequest examples include: a bequest to your parish for building maintenance, to the Diocese in support of a particular program, or to the Anglican Foundation or PWRDF.
- If you are considering establishing a charitable bequest to your church, we would be pleased to talk with you and/or your legal counsel. We can provide appropriate wording to ensure your gift is used as you intended.

If you have questions, or want to talk about a bequest or other type of charitable gift, please contact me, in confidence and without obligation, at the following:

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Your will can be a testament to your faith. Consider leaving a gift to your church.

Proclaiming the Gospel – Making Disciples – Furthering the Kingdom