



The Diocese of Edmonton Planned Giving Office

Planned Giving Options

The personal satisfaction of knowing that you are ‘making a difference’ is usually the only motivation needed for giving to your church or favourite charity; however, planned giving allows you to make the most of your gift, and may permit you to increase your overall giving while saving taxes. Planned giving must be tailored to your circumstances as it affects your financial future. You need to consider your age, and how much money you will need to continue your lifestyle and meet family obligations.

As may be seen below, most planned gifts are irrevocable, so if planning a large commitment, make sure you will have enough money to meet your future needs and those of your family.

Donation type	Revocable?	Receive income or have use of donation during lifetime?	When charitable tax receipt issued	When Church uses gift
Cash gift	No	No	When gift made	When gift made
Life insurance policy—church is owner and beneficiary	No. If premiums not paid by donor church can pay, reduce death benefit or cash in policy.	No	When policy donated, and as donor pays future premiums	After death
Life insurance beneficiary—church not policy owner	Yes, by changing beneficiary	Yes	After death	After death, if beneficiary not changed
Bequest by will	Yes, by changing will	Yes	After death	After death, if will not changed
Gifts of securities	No	No	When gift made	When securities sold
General Synod Charitable Gift Annuity	No	Portion of income received tax-free based on age	Now, based on gift value adjusted for income to be paid based on annuitant’s life expectancy	Residual after death
Charitable Remainder Trust	No	Can use property and receive all income generated	Now, based on gift value adjusted for income to be paid based on annuitant’s life expectancy	Remainder after death

If you have questions or want to learn more, please contact me, in confidence and without obligation, at the following:

David Connell
Planned Giving Officer
 The Diocese of Edmonton
 10035 – 103 Street
 Edmonton, AB T5J 0X5
 Phone: 780-439-7344
 Fax: 780-439-6549
 Toll Free: 1-877-494-8890
 Email: pgofficer@edmonton.anglican.ca