

**A GIFT IN YOUR WILL**

**You can make a simple provision in your Will to leave a specific or residual portion of your assets to United Way Greater Toronto.**

**Benefits**

* Your estate will receive a charitable tax receipt for the full value of your gift, reducing the tax payable on your final tax return and increasing the value for your beneficiaries
* You can make changes to your Will at any time during your life – you retain control and can easily make revisions should your circumstances change

**Professional advice**

United Way Greater Toronto encourages all our donors who are planning a legacy gift to seek independent legal and financial planning advice to ensure your financial goals are considered, your tax situation reviewed, and that your legacy gift is tailored to your circumstances.

An unrestricted gift to United Way Greater Toronto is the greatest way to have immediate impact in meeting the community’s most pressing social needs at the time. However, if you wish to designate your gift, we are happy to discuss this option with you further and encourage you to contact us for appropriate program name and/or description.

For more information, please contact:

Jennifer Chegus

Associate Director, Individual Giving

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**United Way Greater Toronto**

26 Wellington St E 12th Floor

Toronto ON M5E 1S2

**Sample Bequest Wording**

**Specific, unrestricted:**

I give, devise and bequeath to United Way of Greater Toronto the sum of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

**Specific, restricted:**

I give, devise and bequeath to United Way of Greater Toronto the sum of $\_\_\_\_\_\_\_\_\_\_\_\_ to be used for the following purpose(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. If United Way of Greater Toronto is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Trustees of United Way of Greater Toronto.

**General % unrestricted:**

I give, devise and bequeath to United Way of Greater Toronto \_\_\_\_% of the residue of my estate to be used for any purpose(s) approved by the Board of Directors of United Way of Greater Toronto.

**General %, restricted:**

I give, devise and bequeath to United Way of Greater Toronto, \_\_\_\_% of my estate to be used for the following purpose(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. If United Way of Greater Toronto is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

**Residual contingent trust:**

Upon the death of the survivor of my (wife, husband, etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and my (son, daughter, etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to United Way of Greater Toronto to be used for any purpose(s) approved by the Board of Trustees of United Way of Greater Toronto.

**Legal Name:** United Way of Greater Toronto

**Charitable Business Number:** 119278216RR0001

*Disclaimer: The material listed above is intended to provide general information and should not be construed as legal and/or other professional advice. The above should not be used without first reviewing it with your own legal or other professional advisors to determine its suitability for your unique estate planning situation.*