

Create Your Personal Legacy

A gift to Dalhousie through your estate will have a lasting impact on future generations. Your generous contribution will empower students to make their mark and fuel transformative change locally and globally.

With easy and thoughtful planning, we can support you in achieving your philanthropic goals.

This step-by-step guide will help you navigate the process.

Thank you for considering Dalhousie University in your estate planning.

By including Dalhousie in your estate plans, you will become a member of our Legacy Society, which celebrates the generous contributions of our alumni and friends who have thoughtfully made a legacy gift to the university. As a member, you will receive invitations to Dalhousie's signature events, philanthropy publications and the option to be recognized on our donor wall.

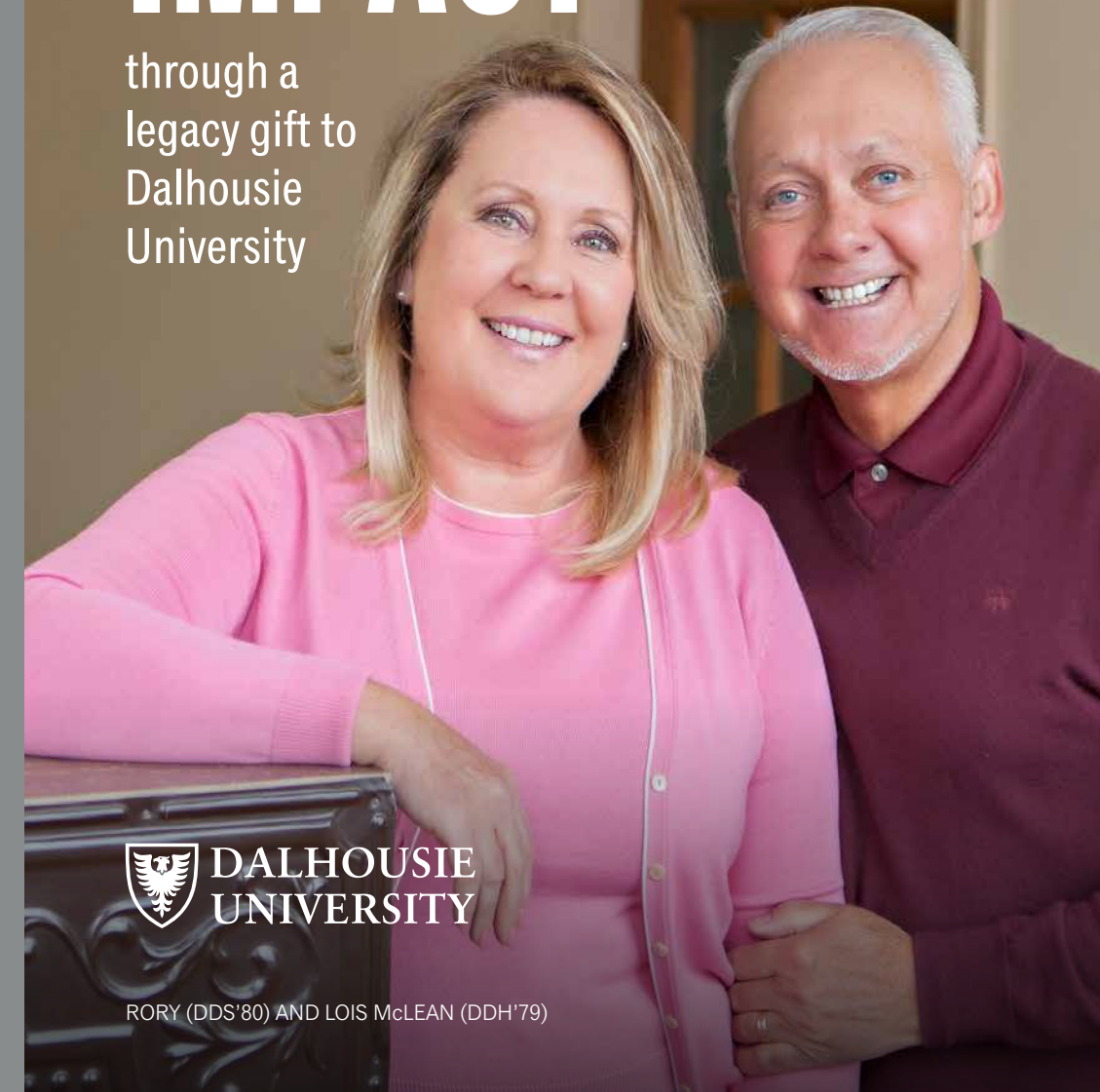
OFFICE OF ADVANCEMENT

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MAKE A LASTING IMPACT

through a legacy gift to Dalhousie University



RORY (DDS'80) AND LOIS McLEAN (DDH'79)

1

Explore the many ways your legacy gift can have an impact

There are multiple ways you can make a difference through your estate. Here are the most common types of legacy gifts:



Bequests: A gift in your will enables you to donate money or a specific asset. A bequest is the most common way to make a gift in your will.



Life Insurance: You can make Dalhousie the beneficiary and/or owner of an existing life insurance policy or you can purchase a new policy for this purpose.



RRSPs and RRIFs: You can name Dalhousie as a direct beneficiary of your Registered Retirement Savings Plan (RRSP) or Registered Retirement Income Fund (RRIF).



Charitable remainder trusts: A charitable remainder trust allows you to arrange your legacy gift now and receive an immediate charitable tax receipt. You can name Dalhousie as the remainder beneficiary while enjoying the investment income throughout your lifetime.

Visit alumni.dal.ca/legacy-ways-to-give for more information about legacy giving options.

DID YOU KNOW?

Leaving gifts of life insurance, RRSPs or RRIFs may have potential tax advantages for you or your estate.

2

Connect with us to learn how you can make the greatest impact

Through legacy giving, you can ensure your passions and values live on. You may designate your gift to Dalhousie's area of greatest need or to your area of interest in a particular faculty, department or program. There are many ways you can make a difference:

- Foster student success through scholarships and bursaries
- Inspire students by enabling innovative learning opportunities
- Enrich learning with enhanced educational programs
- Support life-changing research
- Empower students and researchers to be change leaders with state-of-the-art resources and facilities

Learn how other donors are making a difference with their legacy gifts at alumni.dal.ca/legacy-profiles.

DID YOU KNOW?

Our team is here to help you! We can discuss your philanthropic goals and also provide wording for your will.



“Izaak and Dorothy Killam left a gift to Dalhousie in their will to establish the Killam Scholarships. Receiving this award enables me to explore innovative ways to improve the health of our community.”

— PHILLIP JOY, PhD STUDENT, FACULTY OF HEALTH

3

Talk to your spouse, children, family members and other loved ones

We appreciate that creating a will and planning your estate is deeply personal. Take the time to speak with your family and those close to you about how you would like to leave your legacy.

4

Contact an estate planning professional

We recommend that you consult with a financial and/or legal professional to fully understand the tax and estate considerations of your legacy gift to Dalhousie.

5

Tell us where to direct your gift

Dalhousie wants to know how to use your legacy gift. Meet with us to create a Memorandum of Understanding to outline the impact you want to make through your gift.



“Law school opened doors for me and gave me the opportunity to build a successful career. With my legacy gift, I hope to provide support to deserving students and inspire them to reach their goals in life.”

— JUDGE CORRINE SPARKS (LLB'79, LLM'01)

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