You’re making a difference.

Sometimes, it starts with a moment. The moment you reflect on your life and say, “This is how I want to be remembered.”

Whatever path your life has taken, you have made a difference. Whether with your friends and family, in your community or through your career, you’ve left your imprint.

You’ve made your mark. Now, it’s time to leave your legacy.

So how do you want to be remembered?
Perhaps it’s for the impact you can make related to your lifelong passion? Or maybe you’re looking for a way to help others succeed—as you were once helped?

You can achieve your philanthropic goals with a Legacy Gift to Dalhousie University. Think of a legacy gift as a donation from your estate, a gift to the future.

Whatever your motivation for giving, a legacy gift lets you make a bigger impact than you might have thought possible—while still ensuring your loved ones are looked after.

By remembering Dalhousie in your estate plans, you can make a difference that lasts beyond your lifetime.
Your passions. Your life. Your legacy.

Your passions and values have defined your life—and all those you’ve touched over the years. You’ve made a difference. And with a legacy gift to Dalhousie University, you can continue to make a difference—this time, for tomorrow.

You can shape the future: for our students—and for the world they’ll go on to change. And for the many communities our graduates will impact through their careers and lives.

You can support your life’s passions by making an estate gift to Dalhousie. As with any other kind of gift you give, you decide where and how your funds will be used.
“A university is a living being, always evolving,” says Michael Moosberger, Dalhousie University Archivist. “In a sense, I see my role as the keeper of our history, of our collective memory.” Since arriving at Dalhousie in 2000, Michael’s been doing exactly that. “I like taking on innovative projects that move the archives forward,” he explains. And over the past 20 years, Michael has been able to take many of these initiatives from the idea stage to reality—with the help of legacy gifts left to the Dalhousie Archives.

That’s why Michael and his wife, Julie Morris, a University of King’s College alumna and archivist, have made plans to leave their own legacy to Dalhousie. “With Michael’s pending retirement, we’re entering a new phase of our life together,” says Julie. “Finding a tangible way to recognize the university that played such a significant role in our lives appealed to us—and this was the ideal time to do it.”

And with the Michael Moosberger and Julie Morris Archival Endowment, future university archivists will be free to use the proceeds of the unrestricted gift as they see fit. “I feel I’ve built something here at Dalhousie,” says Michael. “And as my legacy, I’d like to help my successors do what I was able to do.”

“It’s all about giving back, isn’t it?” Michael adds. “Not everyone gets to pursue their passion as a career, and I’m so grateful to Dalhousie for the opportunity to have made a difference here.”

Visit dal.ca/donors/moosberger-morris to read more about Michael and Julie’s story.
For Wes Campbell (BEng’63, LLB’66, LLD’07), it’s always been about engineering. “Even when I was an article clerk, I was doing engineering projects on the side,” he says.

As president of Campbell Comeau Engineering Limited, he credits his lifetime of business success to Dalhousie University. In gratitude, Wes is leaving an unrestricted legacy gift to Dalhousie, directed to the Faculty of Engineering.

Visit dal.ca/donors/campbell to read more about Wes’s story.
Here are a few ways your passions can shape the future:

Give tomorrow’s students the lifelong gift of a Dalhousie education by endowing a scholarship or bursary—or contributing to an existing fund.

Help students grow into tomorrow’s leaders by supporting innovative learning opportunities.

Make education more accessible by opening Dalhousie’s doors to distance learners, mature students and individuals from traditionally marginalized communities.

Make a lasting difference by advancing medical research, clean technology and ocean sustainability by making a gift to support life-changing, ground-breaking discoveries.

Or why not give students the opportunity to envision a different future by helping provide the most advanced equipment, resources and facilities for teaching and research?
You can tailor your gift.

By directing your legacy gift through Dalhousie University, you can leave your imprint on virtually any or all of your life’s passions.

You can, like many, simply direct your gift to support Dalhousie’s area of greatest need, where your generosity will always be felt and appreciated.

Or you can invest in the success of a favourite faculty, department or program—and, above all, its students.

You may choose to leave your donation undesignated or you can tailor your gift to reflect your hopes for the future.
Why not help shape the future?

Think of it as a footprint that lasts, that says “I was here...and I cared.”

As a long-time friend of the university, you know Dalhousie. Maybe you were a student? Or made your career here as faculty or staff? Now in this next chapter of your life, you find yourself reflecting on your time at Dalhousie and thinking about the kind of legacy you want to make.

Everyone has their reasons for leaving a legacy gift. For some, it’s the opportunity to honour someone special in their lives. For others, it’s the prospect of a life-saving cure.

We all have our reasons for wanting to leave our footprint. What are yours?

Allan Tobacca (BN’80) didn’t plan to go into nursing. It was while working as a porter at the Victoria General Hospital back in the early 70s that someone first suggested that he should consider nursing.

“Throughout my career, people have believed in me and encouraged me,” says Allan. And in gratitude to those who helped him grow in the profession, Allan has established a bursary as his legacy gift.

Visit dal.ca/donors/tobacca to read more about Allan’s story.
Your legacy gift works for you, too.

Legacy giving offers you a range of choices and in some cases, potential tax savings for you now—and later for your estate—while maximizing your gift.

**Bequests:** A gift left in your will—whether a specific amount or a percentage of the residual of your estate—is perhaps the easiest and most popular way to remember Dalhousie.

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

**RRSPs, RRIFs & TFSAs:** You can also name the university as a direct beneficiary or partial beneficiary of your Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF) or Tax-Free Savings Account (TFSA). Like the life insurance option, the tax advantages from these registered accounts may allow you to leave a larger gift.

**Charitable Remainder Trusts:** A charitable remainder trust lets you 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.

Dr. Jean Gray, CM (LLD’05), Professor Emeritus, Medical Education, Medicine, and Pharmacology at Dalhousie University, is renowned worldwide for her pioneering work in clinical pharmacology, women’s health and the promotion of women in medicine.

Yet Jean’s stellar career might have taken an entirely different trajectory, had it not been for the financial support that funded her university education.

After the death of her Canadian Army father in 1956, money was tight. Jean’s mother fought long and hard for her to qualify for educational benefits from Veterans’ Affairs. Meanwhile, the top student applied for every scholarship available.

“Without financial assistance, I wouldn’t have been able to afford my education,” says Jean. Later, as a professor, Jean saw her own students struggle to manage the costs of medical school.

So in her estate, Jean is creating a permanent source of support for future medical students. Through a life insurance policy that names Dalhousie as the owner and beneficiary, she has established a scholarship, named for a beloved aunt.

“‘My financial advisor pointed out that any gift left in my will would be taxed off the top once it goes through probate,’ she explains. ‘The proceeds of the life insurance policy, however, will go directly to Dalhousie, meaning the funds can be put to work for the students right away.”

“And by saving on taxes, I’ll be leaving a larger gift,” adds Jean.

Visit dal.ca/donors/gray to read more about Jean’s story.

“I want to invest in the next generation of Dalhousie doctors and help them accomplish what I was able to do.”

— JEAN GRAY, LLD’05
Interested? We can help.

Perhaps you’re wondering, “Should I?”

Your decision to leave a legacy gift to Dalhousie will take some thought. As it should. You’ll have questions that need answers. Ideas you’ll want to discuss. Options you’d like to explore.

We can help.

Here in Dalhousie’s Office of Advancement, we understand legacy giving—and the enduring impact others have had on our university, thanks to gifts from their estates.

We’ll meet with you to discuss your interests, your priorities and what you’d like to accomplish with an estate gift. Together, we’ll identify possible gift opportunities and funding options for you to consider more fully with your loved ones and your professional advisors. You can select the option that best meets your needs and respects your wishes.

And when the time is right, we’ll work closely with you, navigating the necessary steps and arranging the simple paperwork that sets out the terms of your legacy gift to ensure it creates the impact you want.

So how do you want to be remembered? What legacy do you want to create?

It can start with a conversation over coffee.

Let’s chat. Anytime.

Blair Eavis (BA’86) meets with Siobhan Doherty, Senior Development Officer, over coffee to discuss his philanthropic goals. Visit dal.ca/donors/eavis to read about what inspired Blair to establish the Blair Eavis Scholarship.
“The Advancement Office staff members were great: they simply asked me questions about why I was interested in establishing a scholarship and how I’d like to see my money spent.”

— BLAIR EAVIS, BA’86
Talk to your loved ones.

Planning your estate is a deeply personal matter: everyone’s circumstances are different; everyone’s motivations are unique.

Before making any final decisions, talk to a financial and/or legal professional, as you’ll want an expert opinion on the best options for you and your estate.

And, of course, sit down with those closest to you and talk about your philanthropic goals. Discuss your plans. Let them know your wishes.