



Sample Will Clauses

We're here to help

A well prepared, up-to-date Will is important so that you can make your final wishes known. Your Will can ensure the financial security of your family and provide a generous gift for your community. Charitable giving through your Estate can result in significant tax savings. But most importantly, it's a statement of your life experience and your vision for a better tomorrow.

SurreyCares Foundation is here to help. We've been helping people leave legacies for nearly 75 years. It's our expertise and passion. A gift to SurreyCares Foundation goes beyond your lifetime and ensures that your generosity will benefit our community for generations to come.

You can plan for better tomorrow with a gift in your Will. Or consider simplifying your Estate planning by pre-establishing a Legacy Fund today with a gift of \$1,000.

Bequests and sample wording

The charitable bequest in your Will can provide a specific dollar amount, a percentage of your Estate, or a gift of the residue, which consists of whatever remains in your Estate after gifts to your loved ones and all expenses have been paid.

Unless otherwise directed, all Estate gifts to SurreyCares Foundation of \$10,000 or more will be used to establish a permanent endowment fund in honour of the donor. SurreyCares Foundation will invest your donation wisely, and grant the annual income disbursements to charities in accordance to your wishes.

The following Sample Will clauses provide a few options for charitable giving at SurreyCares Foundation through your Estate. There are many ways that your legacy can be structured. We encourage you to talk to your lawyer and your family, and contact us to find out more.

Legal name: SurreyCares Foundation

Address: P.O. Box 34089, Surrey, B.C. Canada V3S 8C4

1. Give Where the Need is Greatest

At SurreyCares Foundation, we know that there is no crystal ball for the future. Our world is changing rapidly, and the issues of today may not be the pressing concerns of tomorrow.

You can count on SurreyCares Foundation always being here as a stable force, offering community support to charities across British Columbia. SurreyCares Foundation has deep roots in the community. As a strategic grant maker in British Columbia for almost 75 years, we offer knowledge, connections and

community expertise. You can trust SurreyCares Foundation to identify emerging needs and make impactful granting decisions.

To give where the need is greatest:

To give [\$____ / ____ % / the residue] of my Estate to SurreyCares Foundation, charitable registration #11928 1640 RR0001, to establish a fund known as the _____, the income of which shall be paid for general charitable purposes in conformity with the objectives of SurreyCares Foundation.

2. Give to the Charitable Cause Closest to Your Heart

You may want to focus your giving, but feel uncertain that the charities of today will be leading the way in the future. SurreyCares Foundation offers a solution. Rather than selecting particular charities, you can choose a charitable cause to dedicate your support. Grant applications will be invited from charities across British Columbia, and decisions will be guided by skilled volunteers who offer their expertise to SurreyCares Foundation.

SurreyCares Foundation offers the following charitable causes to choose from Addressing Homelessness, Animal Welfare, Arts & Culture, Children & Families, Education, Environment, Health, Social Services and Youth.

To give to any one or more of these charitable causes:

To give [\$____ / ____ % / the residue] of my Estate to SurreyCares Foundation, charitable registration #11928 1640 RR0001, to establish a fund known as the _____, the income of which shall be paid for general charitable purposes, having regard to my interest in _____ [insert one or more of the above listed charitable causes].

3. Give to Your Favourite Charities

At SurreyCares Foundation, your endowment fund can support one or more of your favorite charities. Your annual giving will then continue, long after you are gone. This will help your favorite charities to stabilize and plan for the future. We recommend that you contact us in advance to ensure that the charity's name is correct, and that it is in good standing. Should any of your chosen charities cease to exist, SurreyCares Foundation will select a similar charity with a similar charitable purpose.

To give to your favorite charities:

To give [\$____ / ____ % / the residue] of my Estate to SurreyCares Foundation, charitable registration #11928 1640 RR0001, to establish a fund known as the _____, the income of which shall be paid to _____ [list designated charity or charities, & their charitable registration number].

4. Give to an Existing Fund

SurreyCares Foundation acts as Trustee to more 1,700 endowment funds, established by individuals, families, corporations, and charities. Many of our donors establish a Fund during their lifetime in anticipation of a future bequest gift, as it provides peace of mind and flexibility for their Estate planning. A Legacy Fund can be established today with a gift of \$1,000. Please contact us to find out more.

SurreyCares Foundation also provides endowment fund services to 23 charities across Surrey. You can review a complete list on our website at <http://www.surreycares.org/give-to-these-worthy-charities>. There is no minimum amount to make a gift to an existing fund. We recommend that you contact us in advance to confirm the proper fund name.

To give [\$___/ ___% / the residue] of my Estate to SurreyCares Foundation, charitable registration #11928 1640 RR0001, to be added to the _____ Fund [insert exact fund name]

Talk to us

We encourage you to contact us, to find out more about how SurreyCares Foundation can support your legacy vision. There are many options that we'd be happy to explore with you. If you choose to let us know about your legacy gift, we can offer assurance that your wishes can be fulfilled. We'd also be pleased to honour you as a SurreyCares Foundation Legacy Partner, which includes invitations to special events that showcase our community partners. Or, if you prefer anonymity, it will be respected.

Please contact our office at 604.591.2699 or info@surreycares.org

Thank you for your interest in SurreyCares Foundation!