



Legacy Giving

This is the idea of Legacy Giving. When you leave a gift to SurreyCares Foundation in your Will, you are planting a seed - a seed that, with careful tending, will grow into something for future generations to benefit from - ultimately leaving a gift that helps build a better world. That's the power of Legacy Giving.

When you establish a fund at SurreyCares Foundation in anticipation of your estate gift, you benefit from convenience and peace of mind for your future plans.

SurreyCares Foundation offers a flexible approach. We understand that as your life progresses, the charitable causes and charities you wish to support may change. With a Legacy Fund, you have an opportunity to develop a relationship with SurreyCares Foundation. We gain a full understanding of your charitable intent, and provide assurance that your wishes will be fulfilled.

How it Works

A Legacy Fund is a “start-up” permanent endowment fund, with flexible donor advised terms. Once it’s fully established, it can support any registered charity in Canada.

You can establish a personally named Legacy Fund with a gift of \$1,000 today, and a commitment that a future gift of \$9,000 or more will follow through your estate. Granting will begin when the fund reaches \$10,000, either through your estate gift, or additional lifetime donations if you choose. Check out our helpful [Donation Calculator](#) to learn about tax savings that can be obtained by donation from your estate.

Information about your future granting wishes will be set out in the fund's long term planning documents, rather than detailed in your Will. If ever you wish to update your list of charities, you can simply contact SurreyCares Foundation to request a change, and with no need to update your Will.

Benefits

Flexibility — You can shape your future gift on an ongoing basis during your lifetime. If changes are necessary, this can be easily accommodated through SurreyCares Foundation, and without the effort and expense of revising your Will.

Services — You will receive personalized service and access to a range of resources about community needs. You’ll also receive invitations to appreciation events, estate planning seminars, and our Community Causes series.

Ease for your Executor — It can be an overwhelming responsibility for your Executor to carry out your charitable wishes. Your Executor will take comfort in knowing that a Legacy Fund is already established, and will simply transfer your gift to SurreyCares Foundation.

Our commitment to you

When you entrust your Legacy Giving to SurreyCares Foundation, we offer these four commitments to you:

- 1. We will invest your gift wisely.** Today over 1,700 individuals, families and businesses have entrusted their legacies to us. We work with top-notch investment experts to help your fund grow so that the reach of your legacy will expand over time.
- 2. We will carry out your wishes.** We are your legacy partner and we've been helping people leave legacies to their community for almost 70 years. We ensure your legacy is always invested wisely in the community – directed to the best and most effective community projects and charities in the areas you care most about.
- 3. We will ensure that your gift has a lasting impact.** As Canada's largest community foundation, we have deep roots in the community and unparalleled knowledge of community issues and organizations. No matter what your interest – children and youth, arts and culture, education, environment, health care, animals – we will ensure your legacy gift always makes a real difference.
- 4. We will honour your generosity.** There is great power in charitable giving through an endowment fund. It's a reflection of your values, and a statement to future generations about your foresight, concern, imagination and vision. We'll work with you to share your story and inspire others to make a difference in our community – or, if you prefer, your anonymity will be respected.

JOIN WITH YOUR COMMUNITY

When you leave your legacy with SurreyCares Foundation, you become part of something bigger... part of something better. You connect at a deeper level with your community. You leave a more lasting impression in this place you call home. You join a group of caring citizens who are building a better community for our children's children. [Click here to read stories about other donors like you.](#)

Annual Legacy Donor Appreciation Events are our way of saying thanks to donors who have included a gift to SurreyCares Foundation as part of their estate plan. [Click here to see our past events](#) that take place at various venues as an opportunity to showcase our partners in the community. Please let us know if you have included a future gift to SurreyCares Foundation in your estate plans so that we can extend invitations to future events.

Further Information

To find out how you can plant the seed of your legacy today contact at our offices at 604-591-2699 or info@surreycares.org