

## BEQUESTS



A bequest is a well known way to make a significant charitable gift to your Church. Naming the Catholic Church in your Will provides you with this one-time opportunity to create a legacy that will make an impact in your community and ensure the continuation of your Catholic beliefs.

Throughout the history of the Archdiocese, many parishes have benefited from a bequest.

For more information or to obtain a sample clause which could be incorporated in your Will for the benefit of a parish or the Archdiocese, please contact Jules Dagenais; 613-738-5025, ext. 235 or [jdagenais@ecclesia-ottawa.org](mailto:jdagenais@ecclesia-ottawa.org) or visit the Archdiocese's website: [www.CatholicOttawa.ca](http://www.CatholicOttawa.ca).

## GIFTS IN KIND



An option which has benefited several of our parishes throughout the history of the Archdiocese is the Gift in Kind. Simply think of how many of our churches were built on donated land and/or with donated material.

## A PLANNED GIVING PROGRAM FOR CATHOLICS



Please contact the following to obtain more information about making a gift to your Church:

### At the parish:

- your pastor, or
- the parish coordinator for the Planned Giving Program

### At the Archdiocese:

Jules Dagenais  
Director of Stewardship & Planned Giving  
Tel: 613-738-5025, ext. 235  
e-mail: [jdagenais@ecclesia-ottawa.org](mailto:jdagenais@ecclesia-ottawa.org)  
website: [www.CatholicOttawa.ca](http://www.CatholicOttawa.ca)

## Are You Thinking About Making A Gift To Your Church?



*...in thanks for the gift of faith*

*...a gift for the future of faith*



**A PLANNED GIVING PROGRAM FOR CATHOLICS**

## WHY PLANNED GIVING?

The Catholic Church has been there for you and your family during the most important moments of your lives. You want to be there for the Catholics of tomorrow as they start their journey of faith.

By supporting our *Planned Giving Program*, you can ensure that the active works of the Archdiocese and its parishes continue and grow both for today's needs as well as those of our children and grandchildren.



## WHAT IS PLANNED GIVING?

Planned giving is the donor-centered process of planning charitable gifts, whether current or future gifts, that meets philanthropic goals and balances personal, family, and tax considerations.

## WHAT ARE THE OPTIONS AVAILABLE?

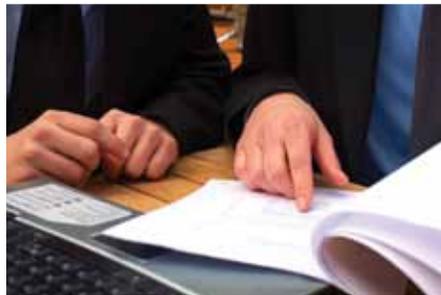
Since *A Planned Giving Program for Catholics* was introduced in 2006, the people of the Archdiocese of Ottawa have been invited to review the following eight (8) methods of Planned Giving which cover present and deferred donations:

1. Cash donation
2. Gifts in kind
3. Publicly listed securities
4. Bequests
5. Life Insurance
6. Registered Plans
7. Residual Interest Trust
8. Charitable Remainder Trust

These options are to be reviewed while noting the generous Federal and Provincial income tax provisions that exist to significantly lower the donor's income tax, thus maximizing the value of your donation.



**PAY LESS TAX = REDUCE COST OF GIFT**



*Prior to making a gift, we recommend that donors receive independent professional advice concerning the possible financial, taxation and legal consequences of doing so.*

## PUBLICLY LISTED SECURITIES

This method of Planned Giving, which provides an immediate source of income to the Church, is quite advantageous to you as transfers of listed securities to a registered charity will 1) give you a tax receipt for the full market value of the stocks you donate, and 2) exempt you on the capital gains realized on the disposal of the securities.

Since the program was launched, we have facilitated the transfer of listed securities from donors to several parishes and Funds of the Archdiocese.

### How to donate securities to the Church?

Complete the *Gift of listed securities* form.

### How to obtain a copy of the form?

Contact Jules Dagenais at 613-738-5025, ext. 235 or [jdagenais@ecclesia-ottawa.org](mailto:jdagenais@ecclesia-ottawa.org), or download the form from the Archdiocese's website at [www.CatholicOttawa.ca](http://www.CatholicOttawa.ca).

## LIFE INSURANCE

Life insurance policy is one way to maximize a gift to the Catholic Church. It enables you to make a significant, lasting impact at a relatively low cost.

There are many options available. Some provide you with tax savings in life and others do so as part of your estate – the choice is yours. A financial advisor could explain the benefits of the various options and which option is most advantageous to you.