

# THE PIERRE ELLIOTT TRUDEAU FOUNDATION



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WHAT IS PLANNED GIVING? Planned giving is arranging a charitable donation at a future time in a way that does not create an immediate financial obligation on you or your family. By arranging your planned gift now, you can support the development and outreach of the Pierre Elliott Trudeau Foundation and be assured that it will continue to support creative thinkers, promote crucial issues and share ideas that matter.

*An independent and non-partisan Canadian charity, the Pierre Elliott Trudeau Foundation was established in 2001 as a living memorial to the former Prime Minister by his family, friends, and colleagues. The Foundation funds outstanding scholars who conduct research in crucial societal issues, and creates opportunities for dialogue and collaboration across organizations and disciplines under four key themes: Human Rights and Dignity, Responsible Citizenship, Canada in the World, and People and their Natural Environment. Since being established, the Foundation has granted hundreds of major awards to top researchers and highly accomplished individuals, in Canada and abroad.*

PLANNED GIVING

## WAYS TO GIVE

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**A BEQUEST** A bequest allows you to leave a specified amount to the Pierre Elliott Trudeau Foundation in your will. After your lifetime, the specified assets will be given to the Foundation for its use. Like all gifts, the donor's bequest can be designated for a specific use within the Foundation. Your gift could help subsidize a Trudeau Scholarship, sponsor the organization of a public seminar, support the development of new initiatives, or do whatever is determined to be of greatest need at the time of your donation.

**A GIFT THROUGH YOUR LIFE INSURANCE POLICY** You may choose to name the Pierre Elliott Trudeau Foundation as a beneficiary of a new or existing life insurance policy, or as a contingency beneficiary should another beneficiary not survive you.

**A CHARITABLE GIFT ANNUITY** This kind of gift allows you to donate a capital sum to the Pierre Elliott Trudeau Foundation and receive, in exchange, a fixed-term income, for yourself or other beneficiaries.

**A GIFT OF SECURITIES, REAL ESTATE, OR PERSONAL PROPERTY** The Foundation accepts gifts in kind of personal property, publicly traded securities, and gifts of residual interest. For instance, there are significant tax benefits for donating an item of cultural property. The Canadian Cultural Property Export and Review Board assesses the value of the donation and issues a tax receipt that can be used against capital gains. A similar tax receipt can be issued for a gift of publicly traded securities. In addition, the realization of capital gains, if any, is tax exempt. As with other types of planned gifts, we strongly encourage you to seek professional financial advice on the different options and benefits related to gifts in kind.

## BENEFITS

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The Foundation relies on contributions from donors to safeguard its independence and ensure the sustainability of its mission. This includes awarding Scholarships to outstanding doctoral candidates, Fellowships to great thinkers, and Mentorships to experienced Canadian leaders, and generating informed and lively debate on major issues of public policy that affect Canadians and global society. Donors also receive significant benefits from planned giving. The Canada Revenue Agency offers several publications on charitable tax credits.

## RECOGNITION

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Those who have already arranged a gift and those with the intention of giving are invited to contact the Foundation for more information on how donors are recognized and celebrated. For more information, please contact the Foundation at 514-938-0001.

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*The information provided herein is general and for the benefit of our community. It is not intended as legal advice. The Pierre Elliott Trudeau Foundation encourages you to consult legal and financial advisors to discuss your own planned giving options.*

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