

Wills & Charitable Bequests

The most commonly planned gift, a charitable bequest, is a donation made through your will. People often think that they do not have enough assets to justify a will - but that's actually not true. No matter what your financial circumstances are, you are the only one who can communicate clearly your wishes in distributing your assets after death. It also prevents the government from distributing your assets in ways that would be counter to you and your family.

How it works:

All it takes is a simple clause in your will to leave a gift to the **Henri Nouwen Society**. The first step is to decide on the share you wish to designate, and simply indicate it in your will that a portion of your assets should be left as a bequest to the **Henri Nouwen Society**. You can choose to use percentages or shares or specific dollar amounts. Then fill out a charitable gift recommendation form that allows you to recommend what you wish to distribute and where to. You may revise your distribution recommendations at any time.

To add the **Henri Nouwen Society** to an existing estate plan, please speak to your lawyer about preparing a codicil which is a document that allows you to make simple amendments without having to rewrite your will. Upon your death, the executor of your estate will transfer your bequest to the **Henri Nouwen Society**.

Advantages:

- Simplify your estate
- Support your selected charities with a single bequest
- Revise distributions without changing your will
- Reduce estate and inheritance taxes

Tax receipts for the full amount of your donation may offset capital gains or other taxes payable and lessen the financial burden to your loved ones.

Contact us for a confidential conversation about **Wills & Charitable Bequests**:

Colette Halferty

Director of Philanthropy and Special Events | Henri Nouwen Society
chalferty@henrinouwen.org or call 1-866-226-2158 | 416 925 3745

Always Seek Financial and Legal Advice

We strongly recommend you seek professional advice to ensure that your financial goals are considered, your tax situation reviewed, and your Planned Gift is tailored to your circumstances.