

ESTATE PLANNING

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. The **WindsorEssex Community Foundation** is here to help. We've been helping people leave legacies for 40 years. It's our expertise and passion. A gift to the **WindsorEssex Community 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 \$5,000.

CHARITABLE BEQUESTS

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 stated otherwise, all Estate gifts to the **WindsorEssex Community Foundation** will be used to support the WindsorEssex Community Fund. This fund provides the WindsorEssex Community Foundation with the greatest flexibility to respond to existing or emergent community needs through our annual Grants Program.

The **WindsorEssex Community Foundation** will invest your donation wisely and grant the annual income disbursements to charities in accordance with your wishes. The following sample Will clauses provide a few options for charitable giving at the **WindsorEssex Community 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.

WE'RE HERE TO HELP!

We encourage you to contact us, to find out more about how we 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 **WindsorEssex Community Foundation** Will Power partner, which includes invitations to special events that showcase our community partners. Or, if you prefer anonymity, it will be respected.

SAMPLE WILL WORDING

1. GIVE WHERE THE NEED IS GREATEST:

At the WindsorEssex Community 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 the WindsorEssex Community Foundation always being here as a stable force, offering community support to charities across Windsor-Essex County. The WindsorEssex Community Foundation has deep roots in the community. As a strategic grant maker in Windsor-Essex, we offer knowledge, connections, and community expertise. You can trust the WindsorEssex Community Foundation to identify emerging needs and make impactful granting decisions. To give where the need is greatest:

"I give the sum of [\$____ / ____ % / the residue] of my Estate to The WindsorEssex Community Foundation, charitable registration #890653595 RR 0001, to establish a fund known as the _____, the income of which shall be paid for general charitable purposes in conformity with the objectives of the WindsorEssex Community Foundation."

2. GIVE TO A FOCUS AREA 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. The WindsorEssex Community Foundation offers a solution. Rather than selecting particular charities, you can choose a Focus Area to dedicate your support. Grant applications will be invited from charities across Windsor-Essex County, and decisions will be guided by skilled volunteers who offer their expertise to the WindsorEssex Community Foundation. Choose from these Focus Areas: Arts, Culture & Heritage, Children & Youth, Community Development, Education & Literacy, Environment, Health & Human Services, Recreation & Sport. To give to any one or more of these Focus Areas:

"I give the sum of [\$____ / ____ % / the residue] of my Estate to the WindsorEssex Community Foundation, charitable registration #890653595 RR 0001, 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 Focus Areas]."

3. GIVE TO YOUR FAVOURITE CHARITIES:

At the WindsorEssex Community Foundation, an 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, the WindsorEssex Community Foundation will select a similar charity with a similar charitable purpose. To give to your favorite charities:

"I give the sum of [\$____ / ____% / the residue] of my Estate to the WindsorEssex Community Foundation, charitable registration #890653595 RR 0001, 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:

The WindsorEssex Community Foundation acts as Trustee to more 80 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 \$5,000. Please contact us to find out more. The WindsorEssex Community Foundation also provides endowment fund services to charities across Windsor-Essex County. 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.

"I give the sum of [\$____ / ____% / the residue] of my Estate to the WindsorEssex Community Foundation, charitable registration #890653595 RR 0001, to be added to the _____ Fund [insert exact fund name] "