

CHARITABLE BEQUESTS AND WILL WORDING



Tomorrow Fund
United for an inspiring future.

When naming a charity such as United Way in your Will as a beneficiary, your estate will benefit from the charitable tax receipt offsetting taxes due. A bequest is the most common type of planned gift. The gift can be a piece of property, a sum of money or a percentage of your estate.

We value you as a donor and welcome you to make charitable contributions in the form of Bequests. The below Will wording is suggested language for you to use when creating your Will. If you have special wishes regarding how you would like to design your Bequest, please contact us as we would be pleased to help.

Unless you instruct otherwise, bequests to United Way of Calgary and Area will go into the Non-Endowment Fund within the Tomorrow Fund.

Bequests to the Endowment Fund

There are various ways in which bequests can be made to the Endowment Fund:

Percentage Charitable Bequest

You give a percentage of your estate to United Way's Endowment Fund.

"I give (____ %) of my estate to United Way of Calgary and Area to be held and administered as a long term endowment in accordance with such organization's practices and policies from time to time applicable to endowments."

Specific Charitable Bequest

You give a specific asset or collection of assets such as cash, securities, or other designated property to United Way's Endowment Fund.

"I give (\$____), or (a specific asset) to United Way of Calgary and Area to be held and administered as a long term endowment in accordance with such organization's practices and policies from time to time applicable to endowments."

Residuary Charitable Bequest

You give all or a percentage of what remains in your estate after all specific bequests have been satisfied and debts and expenses have been paid.

"I give all my remaining assets of any kind to United Way of Calgary and Area to be held and administered as a long term endowment in accordance with such organization's practices and policies from time to time applicable to endowments."

"I give (____ %) of my residual estate to United Way of Calgary and Area to be held and administered as a long term endowment in accordance with such organization's practices and policies from time to time applicable to endowments."

Contingent Bequest

You give all or a portion of your estate to United Way's Endowment Fund when a named individual beneficiary dies before you do.

"In the event that (name of person) predeceases me, I give their share of my estate to United Way of Calgary and Area to be held and administered as a long term endowment in accordance with such organization's practices and policies from time to time applicable to endowments."

Specific Purpose

You have identified a specific charitable area of interest that you wish your gift to be directed to.

"I give, devise and bequeath (____ %), or (\$____), or (a specific asset) to United Way of Calgary and Area to be held and administered as a long-term endowment in accordance with such organization's practices and policies from time to time applicable to endowments and used to [example: "support homelessness in Calgary"]."

Bequests to the Non-Endowment Fund

There are various ways in which bequests can be made to the Non-Endowment Fund:

Percentage Charitable Bequest

You give a percentage of your estate to United Way's Non-Endowment Fund.

"I give (____%) of my estate to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time."

Specific Charitable Bequest

You give a specific asset or collection of assets such as cash, securities, or other designated property to United Way's Non-Endowment Fund.

"I give (\$____), or (a specific asset) to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time."

Residuary Charitable Bequest

You give all or a percentage of what remains in your estate after all specific bequests have been satisfied and debts and expenses have been paid.

"I give all my remaining assets of any kind to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time."

"I give (____ %) of my residual estate to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time."

Contingent Bequest

You give all or a portion of your estate to United Way's Non-Endowment Fund when a named individual beneficiary dies before you do.

"In the event that (name of person) predeceases me, I give their share of my estate to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time."

Specific Purpose

You have identified a specific charitable area of interest that you wish your gift to be directed to.

"I give, devise and bequeath (____ %), or (\$____), or (a specific asset) to United Way of Calgary and Area to be held and administered as a non-endowed gift in the Tomorrow Fund (or, should such fund cease to exist, in the fund which is the successor to the Tomorrow Fund or in any other fund which is similar to the Tomorrow Fund) in accordance with such organization's applicable practices and policies from time to time and to be used to [example: "support homelessness in Calgary"]."



United Way
Calgary and Area

Building a great city for all.