

## Gifts of Securities

A gift of public securities such as stocks, bonds or mutual funds can be a tax efficient way to make a gift to Epilepsy Ontario. By donating publicly listed securities, you may receive a tax receipt for the market value and eliminate the capital gains tax.

Donating securities can be equally effective when given today or in the future through a bequest in your Will.

## Gifts of retirement plans

One of the easiest ways to help people living with epilepsy and seizure disorders is to designate Epilepsy Ontario as a beneficiary of your RRSP or RRIF.

This valuable future gift to Epilepsy Ontario will offset income tax that your estate or your spouse's estate will eventually pay on the assets.

## Thank you!

Thank you for considering a gift to Epilepsy Ontario. We would be happy to help you learn about all the ways you can give, but we do not provide specific legal or financial advice.

For help in preparing your gift, please consult a qualified professional.

Information about these options is not intended as specific financial planning or legal advice.

Epilepsy Ontario strongly recommends that you consult your legal advisors, financial planners and family members when considering a planned gift to ensure your financial goals are considered, your tax situation reviewed and your planned gift is tailored to your circumstances.



803-3100 Steeles Avenue East,  
Markham, ON L3R 8T3  
T: 905-474-9696 TF 1-800-463-1119  
F: 905-474-3663  
epilepsyontario.org info@epilepsyontario.org

Charitable Registration number: 11890-0844-RR0001



## Planned Giving



**Invest today.  
Create a legacy  
for tomorrow.**



Leaving a gift in your estate can make a lasting statement about your life, and offers you a way

of being remembered well into the future. It may also be a way for you to make a gift larger than you ever imagined.

A planned gift ensures that our work at Epilepsy Ontario continues to support people living with epilepsy through client services, counseling, information and referral services, education, and advocacy across the province.

You can choose to support us right away or later on through your estate. By planning ahead, you can make a lasting gift that may also help you influence your future income, your current tax position and the size of your estate.

All gifts, large or small, are important; and can make a significant difference.

## Why a Will is important

Along with protecting your family's future, your Will can be a tribute to the principles and values that you have upheld in your life.

Without a Will, your provincial government decides how your assets will be divided.

Creating a Will, is the single most important step you can take to ensure that your final wishes will be carried out.

## Bequests

A carefully written Will can create a lasting legacy to continue your tradition of annual gifts to Epilepsy Ontario. Bequests can be structured in a number of ways to suit your needs. You can:

- give cash, an asset or a share of whatever remains after estate expenses and other bequests are paid.
- set up a trust that pays income to a loved one for life with a gift of the remainder to Epilepsy Ontario.
- make your gift contingent, payable only if your other beneficiaries do not survive you.

## Gifts of Life Insurance

You can make a significant gift with your life insurance policy by either:

Designating Epilepsy Ontario as a beneficiary on a policy you own. Epilepsy Ontario will then receive a future gift and your estate will receive a tax benefit;

**Or**

Transfer ownership of a new or existing policy to Epilepsy Ontario.

Epilepsy Ontario will then receive a future payout from the policy and you will receive tax benefits during your lifetime.

