



CANADA'S FOUNDATION FOR
THE MILITARY COMMUNITY

YOUR LEGACY
YOUR VALUES
YOUR WILL



LEGACY GIVING AT TRUE PATRIOT LOVE

WWW.TRUEPATRIOTLOVE.COM



BUILD A STRONGER FUTURE FOR CANADA'S MILITARY AND VETERAN COMMUNITY

LEGACY GIVING AT TRUE PATRIOT LOVE

Military members, Veterans, and their families can face unique challenges during and after service, often without access to programs that fully meet their needs. True Patriot Love is committed to ensuring those who serve our country receive the support and recognition they deserve.

True Patriot Love is uniquely positioned to identify the issues of greatest importance, provide direct funding to impactful programs, and champion and advocate for the needs of our military and Veterans.

Your legacy can shape their future. By including True Patriot Love in your Will, you leave a meaningful legacy that ensures those who serve our country, and the families who stand behind them, are supported long into the future.

We focus exclusively on the needs of the military and Veteran community, ensuring your future gift is managed with care and integrity, and creates lasting impact for the brave Canadians who serve and the families who support them.

GUIDE TO LEAVING AN IMPACT

YOUR WILL BUILDS A STRONGER FUTURE

LEAVE A LEGACY THAT LASTS

This document provides a few key practical details that will be helpful as you prepare to speak with your loved ones and your advisors about your plans and wishes.

LEGACY GIVING AT TRUE PATRIOT LOVE

This information is general in nature and does not constitute legal or financial advice. True Patriot Love Foundation recommends that before making any gift of securities of any size, a donor consults with their professional financial advisor(s) for the tax, financial and/or estate planning implications. Individual circumstances differ and you are strongly encouraged to discuss with your own financial counsel to ensure your gift decisions are appropriate to your situation.



THINGS TO CONSIDER

Writing your will is about making a series of important choices.

Walking through these four steps can help you get started.

Remember, your will is more than just a legal document, it's a powerful way to create meaningful change in the world.

1

**Who are the important people in your life?
Who do you need to take care of?**

2

What impact do you want to leave in this world?

3

What do you have to give? How will you divide it?

4

Who is going to put your Will together? Who do you want to be responsible for carrying out your wishes?

A line of soldiers in camouflage uniforms stands at attention outdoors. The focus is on a Black soldier in the foreground, looking off to the side. Other soldiers are visible in the background, slightly out of focus.

WHICH TYPE OF GIFT IS RIGHT FOR YOU?

A financial advisor can help you determine how much you'll need to live comfortably and what you may be able to leave to loved ones.

Once you have a clear picture, consider the type of gift that's right for you. There are several gift options that may be available to you during your estate planning. The following is a summary of commonly used forms of legacy giving.

Please note: we encourage and expect you to consult a professional advisor to determine the best option for you.

A BEQUEST IN YOUR WILL

There are three types of bequests available to you:

01

SPECIFIC BEQUEST

You designate a specific dollar amount or piece of property in your Will to True Patriot Love Foundation (e.g., real estate, stocks/bonds, works of art)

Suggested clause:

"I give the sum of \$ ____ (or a description of the property) to True Patriot Love Foundation to be used in support of its general charitable purposes."

02

RESIDUAL BEQUEST

You allocate all or a portion of your estate to True Patriot Love Foundation that remains after all debts, taxes, expenses and other bequests are paid.

Suggested clause:

"I give (%) of the rest, residue, and remainder of my estate to True Patriot Love Foundation to be used for its general charitable purposes."

03

CONTINGENT BEQUEST

You make a provision in your Will that your gift only takes effect if your primary intention cannot be met (i.e. if the primary beneficiary and alternate beneficiaries do not live longer than you).

Suggested clause:

"If neither (name of primary beneficiary) nor (name of alternate) survives me for 30 days, then I give (description of the amount of cash, percentage of residue, etc.) to True Patriot Love Foundation to be used for its general charitable purposes."

LIFE INSURANCE POLICY

You can also name True Patriot Love Foundation as the beneficiary of a policy (including a policy from your workplace). You might also consider signing over ownership of a policy with premiums that are fully paid. In this case, you will receive a tax receipt for the cash surrender value.





OTHER OPTIONS

There are other ways to make planned or legacy gifts including RRSPs or RRIFs, Charitable Remainder Trusts and more. Please speak to your advisors about other ways to give that might have important tax benefits for you and your loved ones.

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You are invited to have a confidential
conversation about how you can make a
promise to the future by contacting:

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