

Calgary Meals on Wheels

LET A SIGH OF RELIEF BE YOUR LEGACY



Everyone Deserves to Be Well-Fed

Remember a time when a family member or friend struggled with the daily task of meal preparation – the planning, the shopping, the chopping, the cooking, the cleaning. When a new client signs up for our service, we can hear the sigh of relief as they realize our meals will now be there to help them. Your legacy gift will ensure Calgary Meals on Wheels will always be there to provide the comfort of healthy, delicious meals, so our clients do not have to face their challenges alone.

Your legacy is an extension of who you are and what you care about today. Leaving a gift to charity is an impactful way to shape your legacy to reflect your values.

Calgary Meals on Wheels would be honoured to be considered in your legacy giving plan.

Next Steps

Depending on your specific financial situation and intent, you may consider:

- Reviewing the different ways to leave a legacy gift (*see reverse*).
- Writing or updating your Will. For complex matters, we suggest meeting with a lawyer, financial advisor, and/or estate planner.
- Chatting with us further or letting us know if you are including Calgary Meals on Wheels in your Will. We would love to keep you informed of the work we are doing today and the plans we are making for the future.

We Are Here to Help

As you consider this information and decision, if you would like more information or to notify us about a gift already in your Will, please connect with Christine Hentschel, Legacy Giving Officer.

Email: legacygiving@mealsonwheels.com

Phone: (403) 243-3201

Gifts for the Future

There are several gift options with different financial, legal, and tax implications. We gratefully accept the following kinds of gifts:

A Gift in Your Will: The simplest way to leave a gift to Calgary Meals on Wheels is by adding a clause to your Will – a bequest. It doesn't have to be complicated – it can be as simple as one sentence.

Gifts That Pay You Income: A Charitable Gift Annuity can provide annual income to you and a generous gift for Calgary Meals on Wheels.

Other Smart Ways to Give: There are other ways to make a charitable gift to Calgary Meals on Wheels that may further reduce your tax bill.

Securities: Donations of securities (stocks, bonds, mutual funds, etc.) often receive the greatest tax benefit, because these gifts are exempt from capital gains tax, in addition to the standard charitable tax credit.

RRSP / RRIF: Donating your retirement savings can be a quick and easy way of supporting charity while reducing your estate taxes. Simply update your plan administrator's form to include Calgary Meals on Wheels as a beneficiary. With guidance from a professional, you could also make a gift from your RRSP during your lifetime.

Life Insurance: A gift of life insurance can have either an immediate or deferred tax benefit, depending on whether Calgary Meals on Wheels is listed as the owner or the beneficiary of the policy.

What About My Loved Ones?

Loved ones or charity? Many Canadians believe leaving a legacy gift to charity will take away from the support they are leaving for their loved ones. This is a very understandable concern but is typically not the case. You can support both! A gift to Calgary Meals on Wheels can be a specific value, asset, or percentage. Plus, by leaving a gift to charity, there may be tax savings that ultimately leave loved ones with a similar level of support as you originally intended. We recommend talking to your loved ones about your intention to support them and Calgary Meals on Wheels. And remember, your legacy plans can be changed as needed.

Ready to leave a legacy? Information You May Need:

Legal Name: Calgary Meals on Wheels

Charity Registration Number: 11882 3749 RR0001

Address: 5759 - 80 Ave SE Calgary, AB T2C 4S6

This information is not intended to provide legal or tax advice. When preparing your Will or making financial decisions, we highly recommend you consult a professional to ensure your intent is achieved.

