



Alzheimer Society

CANADA

A world without
dementia could
be your gift of
a lifetime.



EVERY 4 MINUTES someone is diagnosed with dementia

1 MILLION people in Canada will be living with dementia by 2030, nearly twice the current number

1 IN 3 people in Canada will become a caregiver to someone living with dementia by 2031, which will almost triple by 2050

You can make an enduring impact in our shared goal to end dementia.

What's Your Legacy?

At the Alzheimer Society of Canada, we want to create a world without dementia. Our research program is helping find ways to prevent dementia as well as improve treatments and care for people living with it – eventually leading to the cures that are so desperately needed. Our programs and services are ensuring people living with dementia and those who care about them have the support and tools they need to live well, based on the most recent scientific evidence.

Our challenge is to change the course of dementia – currently there are no cures, but there is hope. And there is progress.

What would a world without dementia mean to you?

It is a powerful question that we posed to our supporters.

Below are just a handful of their thoughts...



"It would reduce incredible stress that I live with every day. For my loved one, this very clever man with an exceptional memory and knowledge would not have to suffer."

"My husband who is only 64 would have a better, richer, and longer life. We could grow old together."

"It would mean that I would have my beautiful wife back again."

"My mother could enjoy her hard-earned retirement."

"My grandkids could know how wonderful my mother truly is – she would be such a mentor."

Choose the type of gift that's right for you...



A GIFT IN YOUR WILL

Depending on your situation, a gift in your will can take many forms

- **Specific bequest** - a specific amount for your gift
- **Residual bequest** - a percentage of your remaining estate
- **Contingent bequest** - A gift to the society if your named beneficiaries are deceased.



RRSP OR RRIF

You can leave some or all of the funds in your Registered Retirement Savings Plan (RRSP) or Registered Retirement Income Fund (RRIF) to the Alzheimer Society. It's a great way to save on taxes!



A GIFT OF SECURITIES

You can donate stocks, mutual funds or other types of marketable securities. The great news is there is no capital gains tax and you'll receive a receipt for the full amount of your gift.



A GIFT OF LIFE INSURANCE

You can make the Alzheimer Society of Canada the beneficiary of a policy you already own, or you can buy a new policy to donate.

ONLY 20% of families affected by dementia are currently being reached by our programs due to lack of funding

ONLY 30% of research proposals we receive annually can move forward due to lack of funding



This could be the most impactful gift you ever make.

Your generous gift can help fund important research that could turn the tide on dementia and make sure support is available for every person in Canada affected by this ruthless condition.

Your gift of a lifetime can help the Alzheimer Society of Canada:

- Expand our programs and services to support more people living with dementia, caregivers and their families.
- Invest in innovative research looking for ways to prevent, treat and one day cure dementia.
- Improve the quality of life for people living with this condition.
- Stand up for the rights of people affected by dementia.
- Reduce the fear and stigma surrounding dementia.
- Create awareness about the contributing factors of dementia to help people in Canada reduce their risk.



“I want to help find a cure for dementia.”

Caroline and her husband Laurence

Charitable Will Bequests

Leaving a gift in your Will to the Alzheimer Society of Canada can help ensure we can plan far ahead and achieve our vision: a world without Alzheimer's disease and other dementias.

We are dedicated to supporting those affected by dementia and their caregivers, whilst funding research to find cures. The greatest legacy you can leave future generations is through a gift in your Will to the Alzheimer Society of Canada.



Why consider leaving a gift in your Will to the Alzheimer Society of Canada?

Your gift can bring expert care, support, and advice for the 124,000 people diagnosed with dementia every year, their families, and caregivers. It can also bring hope - because we are committed to funding vital research that one day may lead to cures.

- **CONVENIENT** – Your bequest can be made no matter how old you are and can be for any amount you wish.

- **SIMPLE** – A bequest is easy to arrange. Simply instruct your lawyer to include a bequest to the Alzheimer Society of Canada in your Will or codicil.

- **COST-EFFECTIVE** – There are no extra out-of-pocket costs. Your present income will not decrease.

- **TAX RELIEF** – A Charitable Will Bequest is a highly effective way to reduce estate taxes. The Alzheimer Society of Canada will issue a charitable tax receipt for the full value of your bequest. Your estate will use this receipt to reduce the tax payable on your final tax return. If your bequest exceeds 100% of your net income, the excess may be carried back to the previous tax year.

- **FLEXIBLE** – Your bequest can be for a specific amount, a percentage of your estate, or the residue of your estate – that is a gift after your debts have been paid and other bequests made.

- **CONTROL** – You retain use of the charitable gift asset for the duration of your lifetime.

- **PEACE OF MIND** – You can make changes to your Will at any time.

- **SATISFACTION** – Legacy gifts are made for personal reasons in addition to ensuring that the Alzheimer Society continues leading the fight against Alzheimer’s disease and related dementias: via its elite researchers, quality of life improvement, and support programs for care givers. As well, your bequest can create a lasting memorial for you, your family or anyone you may wish to honour.

How it works – ways to give

A charitable bequest in your Will can be in the form of a:

1. **SPECIFIC LEGACY BEQUEST** – a specific sum of money.
2. **RESIDUAL BEQUEST** – a percentage of whatever remains of your estate after gifts to your family are made and any other bequests and expenses are paid.
3. **CONTINGENT RESIDUAL TRUST BEQUEST:** – payable to the Alzheimer Society of Canada after the death of your spouse and/or children.



Sample “Gift in Will” wording

The Alzheimer Society of Canada recommends that you speak with your legal professional to ensure that your Will wording is clear and will result in your wishes being fulfilled without confusion or conflict. To enable the Alzheimer Society of Canada to use designated bequest funds as intended yet accommodate unforeseen program changes, we recommend that your charitable Will bequest include an escape clause.

1. Specific Legacy Bequest:

“My estate trustees shall pay the sum of \$ _____ (or transfer assets with an equal value) to the Alzheimer Society of Canada

The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada.”

2. Residual Bequest:

"My estate trustees shall pay ___% of the residue of my estate to the Alzheimer Society of Canada for the purpose of supporting the highest priority needs as determined by the Society. The receipt of the person who professes to be the proper person to give a receipt on behalf of the said Society shall be a sufficient discharge to my estate trustees for the amount paid or assets transferred. If the Alzheimer Society of Canada is unable to apply all or part of these funds for the specific purpose(s) stated herein, the balance of this bequest not so extended may be used for any purpose approved by the Board of Directors of the Alzheimer Society of Canada."

3. Contingent Residual Trust Bequest:

Upon the death of my (wife, husband, partner, etc.) _____ and my (child, etc.) _____, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to, the Alzheimer Society of Canada to be used for any purpose(s) approved by the Board of Directors of the Alzheimer Society of Canada."

Your advisor will also need to know the following information:

- **Legal Name:** Alzheimer Society of Canada
- **Charitable Registration Number:** 11878 4925 RR0001



"I left a bequest in my Will to ensure that progress toward better treatments and a cure will continue. I'm so hopeful that a breakthrough will come."

Frequently asked questions

Q

Will a gift in my Will to the Alzheimer Society of Canada take away from my family?

A

You can make your family a priority, as well as support vital programs, services and research at the Alzheimer Society of Canada by designating a portion of the residual of your estate. This means, after your family is taken care of, a percentage of the remaining assets will be gifted to the Alzheimer Society of Canada.

Q

Who can help me leave a gift in my Will?

A

A lawyer, financial advisor or accountant will have the expertise to explain your options and guide you through the process.

Q

Do I need to leave a large gift?

A

Any gift, is greatly appreciated and will be put to great use. You can specify a certain amount or you can designate a portion of your estate. Even a small percentage can have a significant impact.

Give the gift of hope for
the future by leaving a
Legacy Gift.

If you have any questions or would like
additional information, please contact:

Email: plangiving@alzheimer.ca

Visit: alzheimer.ca/GiftInYourWill



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