

Estate Planning – Legacy Funds

When you establish a fund at Vancouver Foundation in anticipation of your estate gift, you benefit from convenience and peace of mind for your future plans.

Vancouver Foundation offers a flexible approach. We understand that as your life progresses, the charitable causes and charities you wish to support may change. With a Legacy Fund, you have an opportunity to develop a relationship with Vancouver Foundation. We gain a full understanding of your charitable intent, and provide assurance that your wishes will be fulfilled.

How it Works

A Legacy Fund is a “start-up” permanent endowment fund, with flexible donor advised terms. Once it’s fully established, it can support any registered charity in Canada.

You can establish a personally named Legacy Fund with a gift of \$1,000 today, and a commitment that a future gift of \$9,000 or more will follow through your estate. Granting will begin when your fund reaches \$10,000, either through your estate gift, or additional lifetime donations if you choose.

Information about your future granting wishes will be set out in your fund’s long term planning documents, rather than detailed in your Will. If ever you wish to update your list of charities, you can simply contact Vancouver Foundation to request a change, and with no need to update your Will.

Benefits

- ▶ **Flexibility** — You can shape your future gift on an ongoing basis during your lifetime. If changes are necessary, this can be easily accommodated through Vancouver Foundation, and without the effort and expense of revising your Will.
- ▶ **Services** — You will receive personalized service and access to a range of resources about community needs. You’ll also receive invitations to appreciation events, estate planning seminars, and our Community Causes series.
- ▶ **Ease for your Executor** — It can be an overwhelming responsibility for your Executor to carry out your charitable wishes. Your Executor will take comfort in knowing that your Legacy Fund is already established, and will simply transfer your gift to Vancouver Foundation.



Further Information

Please contact Donor Services at 604.688.2204 or info@vancouverfoundation.ca.

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