

Official Bequest Language to Give to Your Lawyer/Estate Planner

Legal Name: SHARE Family and Community Services Society

Charitable Registration #: 118875798 RR0001

Residual Bequest

“I direct my Trustees to pay or transfer _____(number) of such equal shares of the residue of my estate to SHARE Family and Community Services Society (SHARE) to be used for SHARE’s general purposes [or, to be applied by SHARE as its directors see fit].”

General Legacy

“I direct my Trustees to pay or transfer the sum of \$_____to SHARE Family and Community Services Society (SHARE) to be used for their general purposes [or, to be applied by SHARE as its directors see fit].”

Discretion to Transfer Shares

“In making any payment to a charitable institution pursuant to the provisions of this Will, my Trustees may transfer any shares held by my estate in any publicly traded company or corporation in lieu of cash, provided that the shares transferred shall have a fair market value on the effective date of the transfer equal to the amount payable to the charitable institution. In exercising their discretion, my Trustees shall take into consideration the tax benefits, if any, which may be enjoyed by my estate by transferring such shares in specie.”

Specific Legacy

“I direct my Trustees to pay or transfer the sum of \$_____of my estate to SHARE Family and Community Services Society (SHARE) and I direct SHARE to apply such sum towards programming. In the event that circumstances make the specific use of this gift no longer practical or desirable, the directors of SHARE Family and Community Services Society (SHARE) are hereby authorized to make changes in its use which remain in agreement with the spirit and general intent of the gift.”

Thank you for considering how you can leave a legacy through SHARE Family & Community Services Society.

For more information please call SHARE’s administration office at 604.540.9161 or contact our Director of Development Valerie Hutton - valerie.hutton@sharesociety.ca.

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.