

### *Our Vision*

The Unitarian Church of Edmonton – a liberal religious, multigenerational congregation: We celebrate a rich mosaic of free-thinking, spiritually-questing individuals joined in common support and action. We welcome diversity, pursue the common good, and work for justice. We believe in the compassion of the individual heart, the warmth of community, and the search for meaning in our lives.

*If you are considering making a Planned Gift, the Unitarian Church of Edmonton strongly recommends that you seek professional advice to ensure your financial goals are considered, your tax situation reviewed, and your gift appropriately tailored to your circumstance.*

Additional information, sample forms and clauses are available on our website at [www.uce.ca](http://www.uce.ca), or by contacting us at the address and phone number below.

THE UNITARIAN CHURCH OF EDMONTON  
A Unitarian Universalist Community

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## GUIDE TO PLANNED GIVING



Your Legacy to the Future

### *Your Legacy – A Gift That Keeps on Giving*

Most of us would like to think our lives have touched the world in a positive way, that we will leave behind us something greater than ourselves. One of the ways to achieve this goal is to benefit a group that has our support and affection – our Unitarian Church of Edmonton.

There are many ways for you to make a charitable contribution to the UCE. You can design a gift that honours your philanthropic intentions, while at the same time achieving your financial and tax-planning objectives.

#### *Gifts of Cash*

Cash contributions are a quick and easy way to show your support of the Unitarian Church of Edmonton. Simply write a cheque or make a cash donation. If your employer has a Matching Gifts program, you can easily double your donation to the UCE.

#### *Gifts of Securities*

Contributions of stocks, bonds, GICs or mutual funds are a welcome gift to the UCE. If you contribute securities that have appreciated in value and are held outside of registered plans, they can be transferred directly to the UCE's brokerage account and are completely exempt from capital gains and the resulting tax.

#### *Charitable Will Bequests*

By leaving a bequest in your Will to the benefit of the Unitarian Church of Edmonton, you will make a lasting contribution to the support of the Church and its many programs. You can designate a specific amount, a percentage of your total estate, or a share of your estate's residue after gifts to your heirs and other bequests.

'Someone's sitting in the shade today because someone planted a tree so long ago.'

- Les Brown

'I have drunk from wells I did not dig. I have been warmed by fires I did not build.'  
- anonymous

#### *Gifts of Retirement Plans*

You can specify the Unitarian Church of Edmonton as the named direct beneficiary of your RRSP, RRIF, or other pension plan. This gift is especially beneficial as it allows you to avoid the possible double taxation on retirement plan assets left to your heirs.

#### *Gifts of Real Estate*

Your charitable contribution of real estate – a personal residence, farm, vacation home, commercial real estate or vacant land – is a tax-wise gift that has income and capital gains tax advantages. By choosing an option called a 'Gift of Residual Interest', you can give your personal or vacation property to the UCE and still maintain lifetime use of the property.

#### *Gifts of Life Insurance*

When you first purchased life insurance for yourself or a loved one, you obviously had a need for the benefits. Perhaps today you no longer need the coverage, and have a policy that is either fully paid for or one on which you are still making payments. To contribute your life insurance policy, simply name the UCE as its owner and beneficiary, beneficiary only, or partial beneficiary. The Church can even take over payment of the policy premiums should you desire.

#### *Charitable Gift Annuities*

A Gift-Plus Annuity allows you to make a gift to support the UCE while at the same time receiving a guaranteed, predetermined income for life that may be tax-free. It is an ideal choice if you are concerned about the amount of tax you are now paying, or depleting the capital that generates that income.

*Whatever your gift may be, large or small, please know that the UCE is grateful for all donations, gifts and bequest in support of this vibrant Church and its many programs.*