



Your Legacy Gift to Our Place

It's about the journey--mine and yours--and the lives we can touch, the legacy we can leave, and the world we can change for the better. ~Tony Dungy

After taking care of your loved ones, please consider including a gift in your will (a bequest) to Our Place. This is a meaningful way to make a vital difference in the lives of some of the most vulnerable citizens in Victoria. And, legacy gifts can reduce income tax payable through your estate.

If you are considering including a gift in your will, you may wish to review the following information.

What information will my legal advisor need if I wish to include Our Place in my will?

They will need to know the following:

Our Legal Name: **Our Place Society**

Our Charitable Registration Number: **82709 8344 RR0001**

Our Address: **919 Pandora Avenue, Victoria, B.C. V8V 3P4**

What language is required for my will?

Legacy gifts come in all shapes and sizes and are as unique as the individuals who establish them. Therefore, the language describing your gift will depend on the type of bequest you wish to create. Your lawyer or legal advisor will draft the correct wording, but here's an example:

I give Our Place Society (the sum of \$_____OR_____% of the rest, residue and remainder of my estate OR _____description of a specific piece of property) to be used for the general purposes of Our Place at the discretion of its directors.

Please note that for gifts of **property** (such as real estate, stocks, bonds, jewelry or works of art), if we can't use it to aid in Our Place operations, we will sell it, and use the proceeds (less any appraisals or selling costs) according to the terms of your bequest. As with all our donations, they are used in the most cost-effective way to generate the greatest positive impact for those we serve.

What is the *Legacy of Love* Circle?

Inviting legacy donors to join our *Legacy of Love* circle is our way of saying thank you. But we can only do so if you let us know (because we won't be able to thank you personally once your gift arrives). Many of our legacy donors have told us about their bequests and in doing so we recognize them as part of our *Legacy of Love* circle. As always, we will respect your wishes regarding any form of recognition, anonymity and privacy.

As a *Legacy of Love* donor, you will be able to customize your involvement with Our Place. We will offer you a range of exclusive opportunities such as invitations to speaking events, donor recognition events, and occasional mailings. And, if at any time you wish to change your preferences we will happily respect your wishes.

What if I have additional questions?

If you, or your professional advisor, have any questions or comments regarding a legacy gift, making a current donation, or joining our Legacy of Love, please feel free to contact Norma Cameron.

Jonathan Dallison, Senior Advisor, Philanthropy

Phone (direct line): 250-940-5066

Email jonathand@ourplacesociety.com

We understand that discussions about legacy gifts often involve personal and important decisions. Therefore, any inquiry or conversation will be conducted in the strictest confidence and, as always, we will respect your privacy.

The Our Place Society Privacy Promise

We are committed to protecting your privacy.

We will not rent, sell or trade your information to other organizations, parties or mailing lists.

Any personal information you provide will be kept strictly confidential and used only to keep you up to date about our work, to deliver tax receipts and to send you any other information you have requested.

This information does not constitute legal or financial advice. We recommend that before making a decision on a significant gift to Our Place, you seek independent professional advice to ensure your gift is structured in accordance with your personal circumstance and that the related tax implications have been thoroughly considered.