

HASHOMER HATZAIR – CAMP SHOMRIA CANADA

Legacy Program Charter

We are very grateful that you have decided to leave a gift to Hashomer Hatzair Camp Shomria – Canada in your will, and this legacy charter is our commitment to you.

1. We will always respect your privacy preferences because we appreciate that your will is a personal decision.
2. We recognize that, at any time, you have the right to change your will in any way you prefer.
3. We will use your gift for the purposes that you request.
4. We will use your gift wisely and cost-effectively.
5. We will use your gift to support current growth or place it in a perpetual endowment fund that will provide ongoing support, in accordance with your request.
6. We will keep you in touch with our activities in the way that you request or not at all if that is your preference.
7. We will administer your gift efficiently and with sensitivity and respect.
8. We will continue to recognize and treat your legacy gift as your ongoing commitment to secure the future of Hashomer Hatzair-Camp Shomria.

"Honi HaMa'agal was walking along a road and saw a man planting a carob tree.

"How many years will it take until the tree bears fruit?" he asked.

"Seventy years", came the reply.

Are you sure that you will be alive in seventy years' time to enjoy the fruits of this tree?" Honi asked.

"When I arrived in the world, I found a carob tree, planted for me by my ancestors, and now I plant this one for my children, their children and future generations."

Talmud Bavli – Ta'anit 23a



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Secure the Future – Leave a Legacy

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HAROLD GRINSPOON FOUNDATION



What is Planned/Legacy Giving? Should I consider it? Why? How does it work?

Many Questions, Much to consider. Here are few answers to start a discussion.

What is Planned or Legacy Giving?

Planned or legacy giving includes bequests – gifts through wills - and other giving strategies that are designed to have a long-term impact and leave a legacy, often beyond the donor's lifetime. We can provide background material outlining a wide range of options and benefits to planned giving in Canada.

Should I consider it? Is planned legacy giving right for me?

It's a common myth – perpetuated by sensational news stories and film scenes of hushed, tense will-readings in a lawyer's office - that only the very wealthy leave legacy gifts. This couldn't be any further from the truth. The reality is that almost anyone can make a meaningful legacy gift - *with the full support of their loved ones* – to help carry on the donor's values and serve future generations. Another common yet untrue myth is that legacy planning is only for older people. Many middle aged and younger people, even in their 20s, make a legacy gift part of their planning – and benefit throughout their lives from the satisfaction of acting now to maintain values they support.

Why make a legacy gift? What are the benefits?

As members of the Hashomer Hatzair family, we value working with others in active, open relationships. The best part of making a legacy gift is *now* - in the process of working with your family and loved ones to secure the future of shared values for our children, grandchildren and future generations.

Of course, as the donor you retain full control, can keep your gift plans private and can change the will and gift at any time.

Your bequest/legacy gift is a seed sown today that....

- Supports the values and programs that matter deeply to you, your family and your community
- Gives something back and helps strengthen your community
- Can cost nothing during your lifetime and save significant inheritance taxes
- Can serve as a role model by encouraging others to give.

How does it work?

Over 80% of Canadians make gifts to charity. Most donors, after considering the benefits, say want to make a legacy gift. Yet, despite a relatively simple process, fewer than 7% actually get around to it and many people have not even made wills.

1. If you have not yet done so, make a will. By making a will you can decide what happens to your property and possessions after your death. It is the best way to make sure your estate is passed on exactly as you wish.
2. Although it is possible to write a will by yourself, it is beneficial to get professional advice to make sure that your will is valid and will best express your wishes. You should also get advice on the wide range of planned giving options and benefits.
3. You alone retain full control, can keep your will private, and can change it at any time. However, it is often advisable to make sure that family members are aware of your intentions and can support the achievement of your goals. Making your family members part of the process can also bring added lifelong satisfaction.

It doesn't matter if the gift is large or small. Every meaningful gift is important and almost everyone can participate in planned giving.

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