

Why make a planned gift?

A planned gift can help you achieve your philanthropic objectives as well as your tax and financial goals, and, with careful planning, can help you make a much larger gift than otherwise possible, creating a lasting legacy for generations to come. You may also make your gift in honour or in memory of a special person in your life.

No matter why you choose to make a charitable gift to McGill, your contributions are deeply appreciated. McGill's excellence is built upon the foundation of visionary people having an extraordinary impact through their planning and generosity.

“We were fortunate to have had a good education. We have a strong belief in the value of education, as it makes for a fulfilling life and it opens up opportunities. We chose to invest in education, which has countless benefits, but many people might not be aware of the risks involved with not planning ahead. Remember that it's just like any big decision in your life, such as getting married or buying a house. We finally overcame our inertia to be sure this decision was not made for us by someone else.”

Lili de Grandpré, MBA'81 and her husband, David James, have made a significant impact on McGill's future through their annual gifts, major gifts, and most recently, a planned gift.

Contact us

McGill's Bequests and Planned Gifts staff is pleased to assist you in arranging a planned gift that best meets your own needs, goals and timeline. Please see the back cover for our contact information or mail back the tear-off reply form at the end of this brochure and we will contact you.

Those considering a planned gift should consult their own legal, tax and/or financial advisors. The staff in the Bequests and Planned Gifts Office would be pleased to speak with advisors as well.

Recognizing our donors

The McGill 1821 Society and the Macdonald Legacy Society (for McGill's Macdonald Campus) honour those who have remembered McGill University in their estate plans or through another form of planned gift.

We take great care and pride in acknowledging and recognizing our donors. If you have included McGill University in your estate plans, please advise a member of McGill's Bequests and Planned Gifts Office. This allows McGill to thank you for your generosity and to ensure the purpose of your gift is understood. All such information received will be treated in a confidential manner.

When you inform us of your intentions, you will receive a personalized membership certificate signed by McGill's Principal, along with a commemorative pin. You will also receive invitations to recognition events such as the McGill 1821 Society Teas, where donors can mingle with each other and meet the Principal and/or other University dignitaries.



Membership in the McGill 1821 Society and the Macdonald Legacy Society is a matter of record and kept strictly confidential, as is any other information regarding our members and their bequests or other planned gifts. McGill University will not release or disseminate this information in any manner whatsoever, without the express written consent of the member.

The information presented here is of a general nature and is not intended to constitute advice to any particular person. Please consult your income tax, financial and/or legal advisors before considering or arranging a planned gift. All requests for information are confidential, and will not obligate you to make a planned gift.

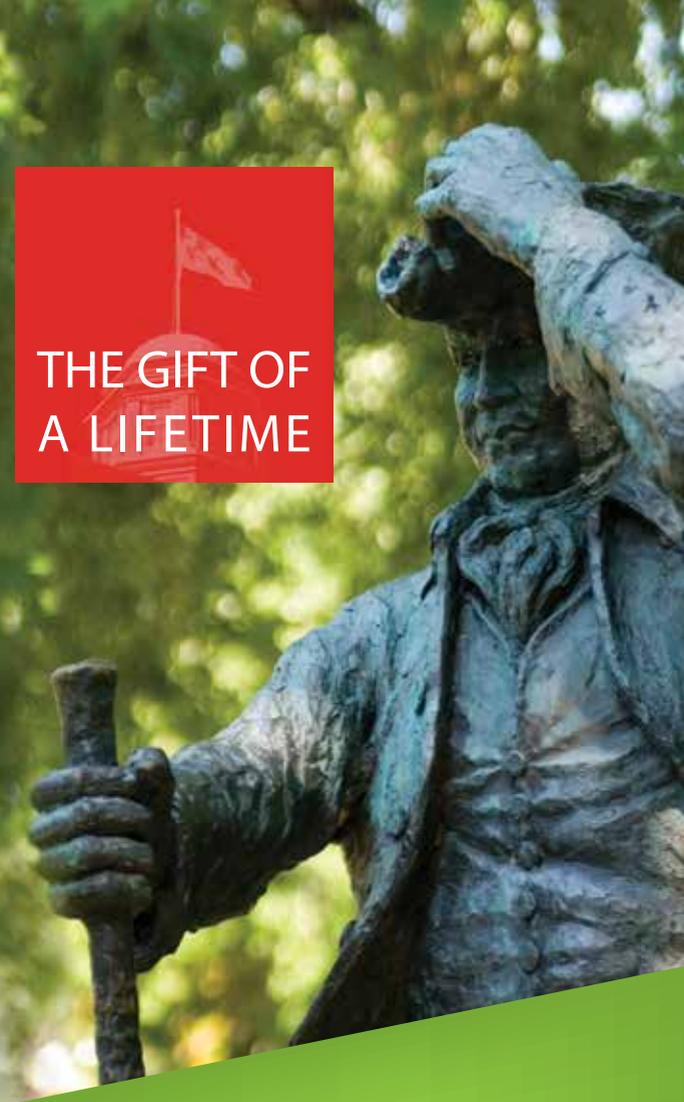
The University's official name is: **McGill University**. It is also listed as: **Royal Institution for the Advancement of Learning**.

McGill University's Charitable Registration Number for Revenue Canada is 11912 8981 RR0001, and its I.R.S. Tax Number for the U.S. is EIN 98-6001153.



Bequests and Planned Gifts Office
McGill University
1430 Peel Street
Montreal, QC H3A 3T3

Tel: 514-398-3560 Fax: 514-398-8012
Toll-free: 1-800-567-5175
Email: plannedgifts.dev@mcgill.ca
aoc.mcgill.ca/give/planned-giving



McGill

Bequests and
Planned Gifts

From **one** planned gift, a **beginning.**



McGill University owes its very existence to the foresight of a generous planned gift. The University was founded in 1821 with a bequest from the estate of Scottish-born Montreal merchant James McGill. McGill has since grown from a small college to a world-renowned university with two campuses, close to 40,000 students and more than 300 programs of study.

Gifts from individuals like you continue to build the future of McGill. Bequests and other planned gifts help the University plan ahead to provide the far-reaching support needed for our outstanding students, faculty, researchers and staff as they advance knowledge, propel research, serve the community and build a better tomorrow.

From **many** planned gifts, a **future.**



What is a planned gift?

A planned gift is a charitable donation arranged during a donor's lifetime, but not available to McGill until sometime in the future.

BEQUESTS

Designate McGill as a beneficiary in your Will. Gifts can be an absolute dollar amount, a specific asset or a percentage or residue of your estate.

RETIREMENT PLAN ASSETS

Designate McGill as a beneficiary of a qualified retirement plan. In Quebec, this must be done through a Will.

LIFE INSURANCE POLICY

Designate McGill as an owner and/or beneficiary, in whole or in part, of an insurance policy.

CHARITABLE GIFT ANNUITY

In return for an outright, irrevocable gift, McGill agrees by contract to pay a fixed amount each year for the lifetime of the annuitant (or last surviving annuitant in the case of a joint annuity).

CHARITABLE REMAINDER TRUST

Assets can be transferred to a trust and the income generated from the capital is paid to the beneficiaries during their lifetime. McGill receives the remaining capital upon the death of the beneficiaries.

U.S. TRUSTS

For Charitable Remainder Trust or Lead Trust gifts, all U.S. citizens must make their gifts in the name of The Friends of McGill University, Inc., whether they attended McGill or not.

Planning your gift

Planned gifts can be tailored to suit your particular interests and preferences, and may vary depending on the designation.

Restricted Gift: This gift can be designated to specific areas such as a Faculty or School, or to general areas of need, such as Student Aid (for example fellowships, scholarships, bursaries), Libraries or Athletics.

Unrestricted Gift: This gift may be given to the University to use at its discretion to target its greatest needs and academic priorities.

Expendable Gift: Depending on the size of the gift, you may request that your contributions be used to directly fund a general or specific University initiative in a timely fashion.

Endowment: You may choose to establish an endowment fund, the income of which is used to support a particular area of need in perpetuity.

SUGGESTED BEQUEST LANGUAGE

Expendable Gift – Restricted or Unrestricted ▶

I give and bequeath the sum of \$ _____ (or ____% of the residue of my estate) to McGill University at Montreal, Quebec, Canada for the general purposes of the University and its greatest needs OR to be used in the Faculty/School of _____ for its general purposes and greatest needs OR to be used in the Faculty/School of _____, designated to _____ (identify program or project).

Endowment – Restricted or Unrestricted ▶

I give and bequeath the sum of \$ _____ (or ____% of the residue of my estate) to McGill University at Montreal, Quebec, Canada to establish (or augment) an endowment fund, the income of which is to be used by McGill University OR by the Faculty/School of _____, for a (insert designation: for example Chair, fellowship, scholarship, bursary, etc.) in my name (or in memory of _____).*

**Please contact us for endowment fund minima*

SAFETY LANGUAGE

Inclusion of the following language is suggested in order to ensure that a bequest designated for a specific use will always remain productive if circumstances change unexpectedly:

"If it should become no longer practical or possible to use this gift for a designated purpose (for example, if the program to which it relates is restructured or discontinued), senior McGill University officers, in consultation with the relevant recipient unit's representatives, will redirect the gift to a new purpose that is, in their opinion, consistent with the original spirit and intent of my gift."

TEAR-OFF here



In order to best assist you with your planning, please fill in this card and mail it to the address below. The staff of McGill's Bequests and Planned Gifts Office will be pleased to contact you in response. All inquiries are kept strictly confidential.

Si vous désirez recevoir des renseignements en français, n'hésitez pas à nous rejoindre à l'adresse ci-dessous.

I am considering a provision in my Will for McGill University.

I have already made a provision in my Will for McGill University.

I have a specific question regarding:

I wish to meet/speak with a Planned Gifts representative.

Name: _____

Birth Date (Optional): _____

Address: _____

City: _____

Province/State: _____

Postal/ZIP Code: _____

Faculty and Year of Graduation:

Telephone: _____

Fax: _____

Email: _____

TEAR-OFF here



Please return this card to:
Bequests and Planned Gifts Office
McGill University
1430 Peel Street
Montreal, QC H3A 3T3

