

Your Legacy

to the Schizophrenia Society of Ontario

A planned gift provides an opportunity for you to help shape and sustain the future vision of an organization that you already support today. It is an opportunity to make a lasting contribution and build a powerful legacy that will help make that vision a reality. A planned gift gives you the opportunity to become a philanthropist - for now, and forever.

These gifts provide a source of stable future funding, which ensures that the Schizophrenia Society of Ontario (SSO) remains a strong and vibrant organization, dedicated to helping individuals and families living with schizophrenia and psychosis. They allow us to run programs, train staff, fund research and support the future needs of the individuals that we help on a daily basis.

Many of our existing supporters have made a planned gift to support the future of SSO. This number is growing, thanks to strong awareness of the good work that is being performed daily by our staff and volunteers.

Funds raised through planned gifts provide SSO with the resources needed to meet the future priorities of those living with schizophrenia, and their families.

At SSO, we can provide you with the direction that you need in preparing a will or an estate plan.

We can also provide assistance on:

- How to include SSO or other charities in your will
- How to leave a gift to the SSO that will preserve your legacy
- How current charitable gifts can increase your lifetime income and/or save taxes



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www.schizophrenia.on.ca

Your Legacy



A Future of Hope

Please contact SSO for more details at:

1 (800) 449-6367 or email us at

giving@schizophrenia.on.ca



Your gift makes a difference

There are a number of ways to plan your legacy through both present and deferred gifts. Your gifts will provide you and your family with a sense of satisfaction and delight in being able to make a very real difference. When you make a planned gift, you give yourself peace of mind.

Through a planned gift, such as a bequest in your will or a gift of life insurance, you can support the things that mean the most to you during your lifetime.

We invite you to consider the following planning options. The option(s) you choose depends on your unique circumstances and financial objectives. Please consult with your financial advisor or lawyer for specific advice.

1. Bequest Gift through a will
2. Beneficiary Designation on an Insurance Policy
3. Beneficiary Designation on a Retirement Plan (e.g. RRSP, RRIF)

1. Bequest Gift through a Will

A bequest gift may be made by naming the Schizophrenia Society of Ontario as an estate beneficiary through one's will.

Bequest gifts can be either **specific** or **residual**.

Specific Bequest

"I give, devise and bequeath the sum of \$XXX dollars to Schizophrenia Society of Ontario (to be allocated to the XXX Program or Research)."

Residual Bequest

"I give, devise and bequeath all (or a portion) of the residue of my estate to Schizophrenia Society of Ontario."

The donor may also choose to provide some direction or flexibility around what may be used to fund the donation. For example;

"I direct my trustee to make the gift in the manner and using the estate assets which will provide the greatest income tax relief, including giving appreciated stocks, bonds, mutual funds and other public securities in place of cash."

It is important to review this language with a legal advisor to ensure it is applicable and enforceable in your jurisdiction.

2. Beneficiary Designation on an Insurance Policy

A donor may use an insurance policy in order to donate to SSO. The donor ensures that the policy names SSO as a beneficiary of the policy. When the policyholder dies, the donor's estate receives a tax receipt for the full amount of the donation.

The donor/policy owner may also choose to assign ownership of a policy to SSO while he/she is alive. In this case, the donor must also make SSO the beneficiary of the policy and agree to continue to pay all outstanding premiums. The tax receipt would generally be issued for the value of the policy on the date of the donation. No further tax receipt would be provided on the death of the donor. Additional tax receipts may be provided for the donor's ongoing premium payments.

- Please contact the SSO for more details at: **1 (800) 449-6367** or email us at giving@schizophrenia.on.ca

3. Beneficiary Designation on a Retirement Plan

The donor may also name the Schizophrenia Society of Ontario as a beneficiary of his/her retirement plan (e.g. RRSP, RRIF) in all provinces except Quebec. The donor ensures that the plan names SSO as a beneficiary directly. (In the province of Quebec, the beneficiary designation may only be made in the Will.)

- Please contact SSO or your RRSP/RRIF Administrator for more details.

