



Easy Ways **You Can** Make a Lasting Impact for Kawartha Land Trust (KLT)



KAWARTHA LAND TRUST

Protecting the land you love.



Gifts That Cost You Nothing Now

“We believe it is important to allow responsible access to natural areas where conditions allow.”

Protect the future of KLT with gifts in your **will** and by **bequest**.

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Gifts That Benefit Your Loved Ones

“As the Kawarthas is a large and diverse area with a variety of landowners and users, Kawartha Land Trust is one organization shaping the future for this region.”

Provide for your family and heirs in addition to KLT with a gift of **life insurance**.

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Other Ways to Give

“KLT has taken a big-picture approach towards working with the community in order to have the greatest possible impact with the resources we raise.”

Safeguard KLT’s future with gifts in **memory** and **tribute** or gifts from donor-advised funds.

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Declaration of Intent

“Many landowners in this area have been caring for and enhancing their land for decades.”

Tell us about your gift.

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Gifts That Cost You Nothing Now

To create your legacy for Kawartha Land Trust, you simply sign your name. That's how easy it can be to include a gift in your will. It costs you nothing now, but your impact goes on for generations protecting our precious land with KLT.

Once your family and friends are provided for, please consider making your concern about the land you love part of your life story with your legacy gift.

Gifts in a Will

When you remember KLT with a gift in your will, you make a lasting contribution to our work. Your legacy gift will drive the most urgent priorities for the land you love.

Here are the ways most people like to make this lasting gift:

Residual Bequest

KLT receives a percentage of the remainder or residue of your estate after other specific legacies have been fulfilled. This gift will be used where it's needed most. A lot of people prefer to give a residual gift as it keeps in line with inflation and does not lose value over time.

Specific Bequest

KLT receives a specific dollar amount or a specified gift in kind (property, collections, books, jewellery, and so on). Gifts in kind will be sold and KLT will use the proceeds where they are needed the most.

The One-Minute Bequest

Now it's easier than ever to create your legacy of care and concern for KLT. You can do it with the One-Minute Bequest.

It takes only a few minutes of your time. It costs you nothing to make this gift that will support KLT for years to come. And it does not require assistance from lawyers or advisors (although we encourage you to consult with experts before making any donation). The only thing you need is a Registered Retirement Savings Plan, a Registered Retirement Income Fund or life insurance.

Here's How It Works:

Step 1: Request a “Multiple Beneficiary Designation Form” (or “Single Beneficiary Designation Form” if KLT is to be the sole beneficiary) for your Registered Retirement Savings Plan, your Registered Retirement Income Fund or life insurance policy from the administrator of your plan.

Step 2: Fill out the form and name Kawartha Land Trust as one of the beneficiaries.

Step 3: Return the form to your plan administrator.

It's that easy. In just three steps, you can make a gift to KLT that costs you nothing now, powers the most urgent priorities facing KLT, and continues its impact for generations to come.



Gifts That Benefit Your Loved Ones Too

You can make a gift that will protect the future of KLT for generations to come and, at the same time, provide for your family and heirs.

Life Insurance Gifts

A gift of life insurance lets you support KLT in a significant and meaningful way. By paying modest life-insurance premiums today and naming KLT as a beneficiary, you can make an impactful gift that will demonstrate your commitment to KLT's work.

One way to leave this gift is to assign KLT as the sole, or one of many beneficiaries, of your own policy or the life insurance policy from an employer. Your estate will receive a tax receipt equal to the direct benefit to KLT. In this way, you create your legacy and benefit your heirs through a significant tax reduction.

A second option is to purchase a new policy, name KLT as owner, and receive tax receipts for any premiums paid after the date of transfer.



Other Ways to Give

You have even more options available to create your legacy for Kawartha Land Trust. Your generosity will safeguard KLT's work today and tomorrow for future generations to benefit.

Gifts of Stocks and Securities

Donating publicly-traded stocks and securities provides a tax-advantageous way to support KLT. When you make a gift of stocks, you receive a tax receipt for the fully appreciated value of your gift, and you will not have to pay tax on realized capital gain. The receipt value will reflect the closing price on the date stocks are received by KLT. The standard capital gain inclusion rate of 50 percent on selling shares is eliminated when you transfer your shares to KLT rather than selling the stocks and donating the proceeds. You may transfer publicly traded stocks and securities electronically from your brokerage account to KLT's brokerage account, which is maintained with CIBC Wood Gundy. Just provide a **Letter of Instruction (see page 8)** to your broker and ask that they transfer your shares to Kawartha Land Trust through our CIBC Wood Gundy account noted below:

Account Number: 474 02591 16

135 Charlotte Street, Peterborough, Ontario K9J 7X6

FINS: T079 CUID: WGDB

Gifts in Memory and Tribute

A memorial or tribute gift to the work of KLT is a meaningful way to express your love, admiration, and gratitude for someone special. Your gift will honour your loved one, create a lasting tribute to them, and connect both of you through your shared concern for KLT's work.

When you make a gift in your will to KLT, you can do it in memory of or in honour of someone who is important to you. It will stand as your legacy and your loved one's legacy for generations to come.

Gifts from Donor Advised Funds

Donor-advised funds (DAFs) are one of the most convenient ways to support a cause you care about while maintaining the flexibility you desire. A DAF is a little like a personal charitable savings account. It allows you to make a charitable contribution (into your DAF account), receive an immediate tax deduction and then make gifts (recommend grants) over time to your favourite charities—like KLT.

Sample Codicil Language

(Amendment to An Existing Will)

This is a codicil to my last will and testament.

I hereby give, devise and bequeath [\$ _____] OR [____ % of the residue of my total estate] OR [____ all of the residue of my total estate] to Kawartha Land Trust for its charitable uses and purposes.

In all other respects I ratify and confirm all of the provisions of my said last Will and Testament dated on the _____ day of _____, 20____.

IN WITNESS WHEREOF, I sign, publish and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this _____ day of _____, 20____.

_____ residing at _____
(name)

Witnesses

_____ residing at _____
(name)

_____ residing at _____
(name)

(Please note the witness must not be a beneficiary of the will and watch the grantor sign the will. The witness must be 18 or older).

Letter of Instruction for Transfer of Stocks and Securities

To donate your gift of stock to KLT, please follow these four steps:

Step 1: Complete the attached transfer form (see following page) including CUSIP# which will be provided by your broker or investment advisor of the assets being transferred. In order to make sure you receive your official receipt for income tax purposes, please send a copy of this form to Daniel Cowan, CIBC Wood Gundy, and John Kintare, Kawartha Land Trust. Forms can be emailed, faxed or mailed to:

John Kintare
KLT, Executive Director
P.O. Box 2338,
Peterborough, ON K9J 7Y8
Tel: 705-743-5599, ext. 2
Email: jkintare@kawarthalandtrust.org

Daniel Cowan
CIBC Wood Gundy
135 Charlotte Street, PO Box 1711
Peterborough, ON K9J 7X6
Tel: 705-740-1702 or 705-740-2447
Email: daniel.cowan@cibc.ca
Fax: 705-740-5239

Please note that forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. Please notify KLT by phone or email if you have sent your forms by mail.

Step 2: In order to initiate your transfer, please forward a copy of the completed transfer form to your broker/investment advisor. Your broker can arrange for the electronic transfer of shares to our CIBC Wood Gundy account:

Account Number: 474 02591 16
135 Charlotte Street, Peterborough, Ontario K9J 7X6
FINS: T079 CUID: WGDB

Step 3: Please inform KLT once the transfer has been completed. Unexpected and or unidentifiable transfers may make it difficult for the KLT to issue the appropriate tax receipt in a timely manner.

Step 4: Please be advised that the value of the donation receipt will be based on the closing price of the shares on the day the securities are received by KLT in accordance with the KLT Financial and Investment Policy.

Letter of Authorization to Transfer Shares to Kawartha Land Trust (KLT)

Donor Information:

Name of donor: _____ Primary phone: _____

Address: _____ City: _____

Postal code: _____ Email: _____

Delivering Institution Information:

Name of donor's broker: _____ Broker's Phone: _____

Broker's fax: _____ CUSIP: _____

Your account number: _____

Firm: _____ Date of transfer to KLT account: _____

Name of Security: _____ Number of shares: _____

Value of each share (approx.): _____ Total donation (approx.): _____

Gift Designation / Recognition:

☐ I would like my gift to remain anonymous

☐ I would like my gift to be recognized as follows: _____

I understand that I will receive a tax receipt from Kawartha Land Trust based on the closing price of the shares on the day the transfer arrives in the KLT account.

Date

Signature

Kawartha Land Trust Broker Information:

CIBC Wood Gundy Inc.

Daniel Cowan

Account Number: 474 02591 16

FINS: T079 CUID: WGDB

Dealer/Rep Code 9280/E2R

135 Charlotte Street, PO Box 1711

Peterborough, ON K9J 7X6

Tel: 705-740-1702 or 705-740-2447

Email: daniel.cowan@cibc.ca

Fax: 705-740-5239



Declaration of Intent

Thank you for naming Kawartha Land Trust in your will or estate plan and making a difference by protecting land in the Kawarthas.

We would love to know what inspired your thoughtful commitment to protect the land you love. The information you provide here will ensure that we have accurate records so that we can provide the best possible stewardship of your gift. This is not a binding legal document, and your information will be kept confidential. If you have questions, please contact John Kintare at 705-743-5599 or jkintare@kawarthalandtrust.org

Tell Us About Your Gift

We would love to know what inspired you to thoughtfully include a gift in your will or estate plan to KLT.

Signing date of your will: _____

I have supported KLT through the following type(s) of deferred gift:*

- ☐ Gift in will
- ☐ Life insurance policy
- ☐ Beneficiary to RRSPs, RRIFs, donor-advised funds or other registered products
- ☐ Gifts of stocks or securities
- ☐ Other

Is this gift revocable or irrevocable?

- ☐ This gift is revocable (can be changed)
- ☐ This gift is irrevocable (cannot be changed)

Is this a residual share or specified amount?

- ☐ This gift is a residual share (or percentage)
- ☐ This gift is a specific amount
- ☐ Prefer not to say

Have you planned this gift in honour of someone?

- ☐ Yes
- ☐ No

With your generous gift commitment, we are pleased to welcome you to Kawartha Land Trust's **Cedar Stand Society**. As a token of our appreciation, we would like to send you a letter of gratitude from our Board Chair and we would like to keep in touch with KLT's related news and invitations that will bring you closer to our work. Please include your contact information below:

First name: _____

Last name: _____

Address (line 1): _____

Address (line 2): _____

City: _____ Prov.: _____

Postal code: _____ Phone: _____

Email: _____

**For more information about how
you can leave a legacy, please contact:**

John Kintare, Executive Director

Email: jkintare@kawarthalandtrust.org

Tel: **705-743-5599** | Cell: **705-731-7347**



KAWARTHA LAND TRUST

Protecting the land you love.

Office Location:

1545 Monaghan Road,
Peterborough, ON K9J 5N3

Mailing Address:

P.O. Box 2338
Peterborough, ON K9J 7Y8

Charitable Registration No. 879086718RR0001

www.kawarthalandtrust.org

