



If you would like to make a gift in your will to support the “Rotary Club of Edmonton Strathcona Endowment Fund” that this Rotary Club created at the Edmonton Community Foundation (“ECF”) please see the following sample will wording:

STEP 1: Select Gift Type

I give to the Edmonton Community Foundation, BN/Registration NO. 122437072RR0001

- ___ % of the residue of my estate, or
- \$___ (specify amount), or
- an amount equal to the fair market value of “description of property” at the date of my death, or
- “description of property” (caution—contact ECF to discuss).

STEP 2: Choose how we use your gift:

... to support the *Rotary Club of Edmonton Strathcona Funds* held by Edmonton Community Foundation.

(or if you would like your gift to provide support to more than one charity, call ECF and they can provide you with more tailored wording for your will) .

STEP 3: Changes in circumstances may create additional gifts:

Please consider including in your document a clause that allows a failed or lapsed gift, for example a gift given to a predeceased beneficiary, to be given to Edmonton Community Foundation for the same purpose.

STEP 4: Tax Incentives:

A special tax incentive exists for “in-kind” gifts of “publicly traded securities”. Therefore, make sure your will gives your executor the power to choose to make your gifts to Edmonton Community Foundation “in cash or in-kind”.

This document is not intended to provide or replace legal advice. Donors and their advisors seeking specific information or wishing to obtain a sample fund agreement for review, please contact Edmonton Community Foundation directly at 780.426.0015. One of ECF’s donor advisors will be pleased to help you.