

## **PLANNED GIVING INFORMATION PACKAGE**

### Overview

A planned gift through your estate to the Alliance Française Vancouver (the “AFV”) enables you to leave a legacy of continued support that will help to assure the future success of the AFV and its mission. In addition, planned gifts may provide financial/tax benefits for you and your family.

An estate gift to the AFV may be structured in a variety of ways, including as a gift of a specific dollar amount or of a particular asset. Alternatively, you might wish to leave the AFV a certain percentage of the remainder of your estate, after providing for family members and other beneficiaries. You also may stipulate whether your gift is for the general support of the AFV or for a specific purpose. Your gift may be made in your name, or in honor or in memory of another individual.

Estate gifts to the Alliance Française Vancouver may include cash, securities, real estate, tangible personal property such as jewelry and works of art, or anything else of monetary value. You might consider making the AFV the beneficiary of your life insurance policy, Individual Retirement Account and/or other accounts that permit you to name a beneficiary.

### Le Club des Fondateurs

When you inform us that you have made a planned gift to the Alliance Française Vancouver, you become a member of the “Club des Fondateurs”.

Donors in this club are recognized every year in the AFV’s annual report.

### How to Notify Us of Your Planned Gift

Once you include the Alliance Française Vancouver in your estate plan, you can choose to notify us by completing and returning the planned gift intention form on pages 3.

### Tax Identification Number

When you establish your gift, your estate planning advisor might ask for the Alliance Française Vancouver Charitable Tax Number. That number is 106702046 RR 0001.

## EXAMPLES OF WILL CLAUSES

When making or revising a will it is recommended you obtain the assistance of your legal advisor. As the following examples show, bequests to Alliances Française Vancouver can take various forms to meet your wishes.

### Bequest for Unrestricted Purposes

This is the most flexible type of bequest and is extremely important as Alliance Française Vancouver is granted full discretion in using the gift.

- A **specific** bequest – gives a specific cash amount or item of property.

*“I give to Alliance Française Vancouver the sum of \$ \_\_\_\_ (or named property) to be used for the general purposes of Alliance Française Vancouver, as the Board of Directors shall determine.”*

- A **residual** bequest – gives all or a portion of whatever remains after payment of debts, taxes, and other bequests.

*“I give to Alliance Française Vancouver \_\_\_\_ percent of the residue of my estate to be used for the general purposes of Alliance Française Vancouver, as the Board of Directors shall determine.”*

- A **contingent** bequest – take effect only if the primary purposes cannot be achieved, for example, if the primary beneficiary does not survive you.

*“If (name of primary beneficiary) does not survive me for 30 days, then I give to Alliance Française Vancouver (a cash amount, named property, percentage of the residue) to be used for the general purposes of Alliance Française Vancouver, as the Board of Directors shall determine.”*

### Bequest for Restricted Purposes

Any of the above forms of bequest can also be used in making a restricted use bequest, simply describe the particular purpose. For example:

*“I give to Alliance Française Vancouver the sum of \$ \_\_\_\_ (or named property) to be used for (e.g. an Alliance Française cultural program).”*

Please obtain advice from your legal advisor in preparing your Will and making a gift through your Will. The above information can be used for discussion purposes by you and your legal advisor; however, it is not intended to be legal advice.

## PLANNED GIFT INTENTION FORM

**Name(s):**

**Date(s) of birth:**

**Street:**

**City/State/Zip:**

**Email(s):**

**Phone # (s):**

**Type of planned gift:**

**Estimated current value of planned gift: \$**

**Please use my planned gift to support:**

- ☐ General operations / area where needed most
- ☐ Other\*:

*\*We will be pleased to discuss your planned gift with you and your advisor(s) in order to ensure that we can honor your charitable wishes.*

**The Alliance Française Vancouver wishes to recognize you as a member of the Club des Fondateurs in our annual report.** By agreeing to have your name listed (along with other donors), you will help inspire more philanthropists to make planned gifts to the AFV.

**When you return this form, please enclose a copy of the relevant provision of your will, trust, or estate planning document. Mail them to:**

Alliance Française Vancouver  
Attn: Damien Hubert, ED  
Suite 6161 Cambie street  
Vancouver, BC, V5Z 3B2

***If I/we make any changes to the enclosed provision, I/we will notify the Alliance Française Vancouver of such changes.***

**Signature:**

**Date:**

***Merci beaucoup for your support of the Alliance Française Vancouver***