LEAVING A LEGACY GIFT TO EMPOWERMENT SQUARED

Planned giving allows donors to invest in the future of the community they love, and Empowerment Squared is uniquely positioned to assist you. Review the information below as you consider establishing your gift, and contact us with any questions about how we can help you strategically accomplish your future financial and charitable objectives.

Who can make a planned gift?

Anyone with a desire to give can make a planned gift. Generally, donors give assets like RRSPs, securities, real estate, insurance benefits and cash. Many are surprised to learn how easy it is to create a lasting legacy that can preserve the family name, honour loved ones, support a favorite nonprofit, minimize tax burdens and/or support the community. A bequest in a will to Empowerment Squared can provide a tax credit against up to 100% of the donor's income in the year of the donor's death and may be applied to prior and/or future returns.

What good work can I do with my planned gift?

Your planned gift can be directed to any of Empowerment Squared's existing local or international initiatives, or left unrestricted to be used at the discretion of the organization. By making an unrestricted gift, you ensure that your gift will provide the maximum benefit to the community. Often donors find it most satisfying to provide a gift with flexibility.

When should I include the gift in my estate plan?

Any time you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your financial or legal advisor can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes and other considerations.

How do I plan an estate gift?

Call your financial advisor, estate planner, or the Empowerment Squared staff. We provide confidential philanthropic services to prospective donors and theirprofessional advisors, without pressure or obligation. Giving a planned gift is simple - you include a bequest or planned gift to Empowerment Squared in your will and notify us. Upon your death, we direct your gift to the Empowerment Squared initiative that you have recommended.

How do I become notify Empowerment Squared of my planned gift?

The process is very simple. Once you have made provisions for naming Empowerment Squared as a beneficiary, please complete a Statement of Intent that clarifies your commitment and communicates your wishes. Some donors also work with us to prepare a memorandum of understanding. While it is not required, it does allow you to further clarify your intent for your planned gift.

Note: The information on this page can help facilitate discussions between you and your advisor. It is not intended as legal or financial advice. We encourage you to consult a qualified professional.

EMPOWERMENT SQUARED

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If you are in the process of creating or updating your will, here are a few important details that you will need to know:

Legal name: Global Citizens Care for Underprivileged and Refugee Empowerment Inc. o/a Empowerment Squared

Charitable Tax Number: 806582896RR0001

Website: empowermentsquared.org

Address: 103-162 King William St., Hamilton, ON L8R 3N9

Phone: (905) 393-5370

Sample statement to be added in your will:

"I [your full name] bequeath to the Global Citizens Care for Underprivileged and Refugee Empowerment Inc. o/a Empowerment Squared of 103-162 King William St., Hamilton, ON L8R 3N9 _____% of the residue [or a specific amount] of my estate for its own sole and only use absolutely.

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PLANNED GIVING STATEMENT OF INTENT

This statement is an expression of my intent to provide for the future of Empowerment Squared through a planned or estate gift. The provision(s) made include the following:

☐ An outright bequest upon the passing of the donor, or the passing of the donor and spouse.

☐ A life insurance policy, in which Empowerment Squared is named as beneficiary or owner and beneficiary.

☐ Retirement assets, in which Empowerment Squared is named as a beneficiary.

☐ A trust agreement, with income reserved for the donor, spouse, or other income beneficiary.

☐ Other (please specify)

Purpose

It is my wish that the gift be used:

☐ At the discretion of Empowerment Squared, to create the greatest impact by supporting its most compelling needs and opportunities.

☐ For the following existing fund(s) or purpose:

Special circumstances of my gift include:

I would like to work with Empowerment Squared to create a memorandum of understanding that details the purpose of my gift. ☐ Yes ☐ No

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PLANNED GIVING STATEMENT OF INTENT

Recognition*

Empowerment Squared appreciates the opportunity to acknowledge your commitment by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

☐ I (we) permit Empowerment Squared to use my/our name(s) in printed lists of planned gifts, which may appear in Empowerment Squared's annual report, newsletter, web site and/or other publications.

☐ I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.

☐ I (we) prefer to remain anonymous during and after my/our lifetime(s).

Donor
Name _____ DOB _____
Address _____ City _____
Province _____ Postal Code _____ Country _____
Phone _____ Email _____

_____ _____
Donor Signature *Date*

Spouse
Name _____ DOB _____
Address _____ City _____
Province _____ Postal Code _____ Country _____
Phone _____ Email _____

_____ _____
Spouse Signature *Date*

Thank you for your commitment and your investment in Empowerment Squared. If you have any questions, please contact us at (905) 393-5370 or info@empowermentsquared.org.

**Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.*

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