



## **Your Will: Leaving a Bequest to the Slocan Valley Legacy Fund**

A well-prepared, up-to-date will is important so that you can make your final wishes known.

Your will can ensure the financial security of your loved ones and can provide a generous gift for your community and the causes you care about. Charitable giving through your estate can result in significant tax savings and make a statement about your life experience and your vision for a better tomorrow.

A gift to the Slocan Valley Legacy Fund lasts beyond your lifetime and ensures that your generosity will support the community and the causes you care about for generations to come. Your donation will be invested wisely and the annual income disbursements will be granted to charities that benefit the Slocan Valley.

When you make or update your will, you are encouraged to talk to your lawyer and your family about your intention to make a bequest to the Slocan Valley Legacy Fund. A charitable bequest in your will can be set up as

- a specific dollar amount to be donated
- a percentage of your estate to be donated
- a gift of residue: a donation of whatever remains in your estate after gifts to your loved ones and all expenses have been paid.

Your lawyer or notary is in the best position to advise you on your optimal will wording to ensure the document is legally effective, properly expresses your wishes and maximizes tax benefits. All donors are encouraged to review their philanthropic intentions with their professional advisor.

**See reverse for detailed information for Will Preparers...**

## **Information for Will Preparers**

The Slocan Valley Legacy Fund is managed by the Osprey Community Foundation. Please ensure the will wording specifies that the testator's bequest to the Osprey Community Foundation is designated to the Slocan Valley Legacy Fund.

The Osprey Community Foundation is a registered Charitable Organization and a Public Foundation, registered with the Canada Revenue Agency, Registered Charity number 874925938 RR0001.

### **Osprey Community Foundation**

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Email: [ed@ospreycommunityfoundation.ca](mailto:ed@ospreycommunityfoundation.ca)  
Executive Director: Tina Choi  
Website: [www.OspreyCommunityFoundation.ca](http://www.OspreyCommunityFoundation.ca)

### **Slocan Valley Legacy Fund**

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Phone: 250.226.7399  
Email: [svcls.chair@gmail.com](mailto:svcls.chair@gmail.com)  
Chairperson: Val Mayes  
Website: [www.slocanvalleylegacy.com](http://www.slocanvalleylegacy.com)

Note: The Slocan Valley Community Legacy Society is an affiliate of the Osprey Community Foundation, promotes and advises the Slocan Valley Legacy Fund.