

Legacy Pledge Form

Thank you for your interest in IISD Experimental Lakes Area's (IISD-ELA) vital work in preserving and protecting our most valuable resource—water.

IISD-ELA recognizes that your bequest intentions are a personal matter, and you may wish them to remain confidential. However, if you are willing to complete this Pledge Form, it will help us for planning purposes.

In order for your legacy gift to IISD-ELA to take effect, you must make a will or make changes to your existing will, known as a codicil. This pledge form is not legally binding; it is simply a statement of your present intentions.

You are free to change your will at any time. Any information you choose to share with IISD-ELA about your legacy will be treated in the strictest confidence.

Please complete the form and return to IISD-ELA:

Attention:

Tammy Hildebrand, IISD-ELA Director of Development

Hard copy via mail:

IISD Experimental Lakes Area, 111 Lombard Avenue, Suite 325, Winnipeg, MB R3B 0T4

Or scanned via email:

thildebrand@iisd-ela.org



Full Name: _____

Address (including postal code and country): _____

Phone: _____

Email: _____

Solicitor/executor's name and contact details: _____

Donor recognition choices: (please check one)

- I/we wish to remain anonymous and do not want this gift acknowledged in public.
- I/we would like to be acknowledged as a supporter of IISD-ELA with the following wording:

Name of individual(s) or family name: _____

Please use this space if you would like to tell us anything about yourself, your gift and the reason you have chosen to support IISD-ELA's work in this way.

Please select one of the following options:

- I have already included IISD-ELA in my will
- I intend to remember IISD-ELA in my will
 - The residue of my estate
 - A proportion of the residue of my estate _____%
 - A fixed sum of CAD\$ _____
 - Other

Please give details: _____

Signature: _____

Date: _____

What are the different ways of leaving a gift to charity in my will?

- ▶ A **pecuniary or monetary legacy** allows you to leave a specific sum of money to IISD-ELA. It is possible to link this sum to inflation so that the gift does not depreciate over the years. Please consult your legal advisor.
- ▶ A **residuary legacy** allows you to leave all or part of the remainder of your estate to IISD-ELA, after other legacies and charges have been met.
- ▶ A **reversionary legacy** leaves your assets to a named beneficiary (for example, your spouse or other dependant) for their lifetime, with the whole or a portion reverting to IISD-ELA on their death.
- ▶ A **specific or non-monetary legacy** allows you to leave a specific possession (e.g., shares, property, stocks, pictures or furniture) to IISD-ELA to be retained or sold to provide funds for our work.
- ▶ A **conditional legacy** provides for the eventuality that, if none of your dependents survives you, your estate will be left to other named beneficiaries including, perhaps, IISD-ELA.

What should I include in my will?

IISD-ELA would be delighted to receive any gift that you choose to make in your will. We suggest that you consult your solicitor, who will be able to advise you on the next steps. You should also obtain appropriate taxation advice on any proposed gifts of property under your will. Please note that a legacy should refer to IISD Experimental Lakes Area:

“I, [INSERT FULL NAME], give to IISD Experimental Lakes Area, 111 Lombard Avenue, Suite 325, Winnipeg, MB R3B 0T4, charitable registration number 850309576RR0001:

Please check one:

- the residue of my estate
- a proportion of the residue of my estate: _____%
- the sum of CAD\$ _____
- other (give details below)

[free of tax] for the general purposes of IISD-ELA’s work and I declare that the receipt of the Director or other authorized Officer for the time being of IISD-ELA shall be a good and sufficient discharge to my Executors.”

Can I leave my legacy gift to a specific program or designated area of IISD-ELA?

If you would like to direct your bequest to a specific aspect within IISD-ELA, please contact us to discuss your wishes. We will advise on whether IISD-ELA will be able to comply with the terms of the gift. In consultation with your solicitor, we recommend that your preference is an “expression of wish” rather than a “binding obligation.” This will enable IISD-ELA to make use of the gift even if the particular program or designated area ceases to exist. We recommend that you ask your solicitor to include your expression of wish in your will, followed by the words “but without imposing a binding obligation” to counteract the possibility of IISD-ELA being unable to receive your gift.

How will IISD-ELA use my personal information?

IISD-ELA collects the personal information you provide to us in this form so we can record your bequest intentions and keep you updated on IISD-ELA’s work. Your details will be treated in the strictest confidence, and IISD-ELA will never share your personal details with any other organization without your permission. If you would like to gain access to your personal information or require further details, please do not hesitate to contact us.

Thank you for considering supporting IISD-ELA’s work in this way.

We look forward to continuing this journey together in protecting our most valuable resource—water.

If you have questions, or require more information, please contact:

Tammy Hildebrand

Director of Development
IISD Experimental Lakes Area

Phone: (204) 958-7700 ext. 719

Email: thildebrand@iisd-ela.org