

PLANNED GIVING



United Way
Perth-Huron

Your passion, your plan, your way

Planned gifts offer another opportunity to help create the future you want for Perth and Huron Counties. Planned effectively, these gifts can provide substantial financial benefits and tax savings while ensuring the issues you care about will continue to be supported in the future.

Giving life insurance

Name United Way as the beneficiary on your policy; the receipt issued qualifies for a tax credit that can offset the income tax liability on your estate.

OR Donate a new or existing life insurance policy directly to United Way, giving an immediate tax benefit as well as a tax receipt for each premium paid.

Giving stocks

Your gift can be in the form of shares, bonds or mutual funds. The elimination of capital gains on a gift of stocks may create considerable tax advantages for you depending on your situation.

Giving bequests

Provide a gift in a will including a specific gift, a portion of your estate, or RRSPs/RRIFs. Please consider sharing your intention to give a future gift with us in advance to ensure we are honouring your wishes.

Call us!
519-271-7730
877-818-8867

32 Erie Street
Stratford, ON N5A 2M4
perthhuron.unitedway.ca

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Leaving a gift to a charity in your will *does not* diminish what you leave to your loved ones.

Canada's tax regulations allow for money to be given to a charity that you would otherwise give to the Canada Revenue Agency in taxes.

If your net income in the year of your death is less than the amount you give, your executor can claim a rebate against your previous year's income and add it to your estate.

Planned well, the result can leave more for your loved ones while enriching the future of your community.



UNITED WAY HELPS OVER 32,000 PEOPLE IN PERTH & HURON EACH YEAR

A life changed by United Way

"I used to hate summer holidays. My family couldn't afford to go away and sometimes, I hid to escape the sound of my parents fighting. I dreaded the question, "What did you do this summer?" Then I was matched with a mentor and got to do so many things. Now, I look forward to going back to school and sharing happy memories." - Heather



United Way's long-term investment option for those who want to build legacies that reflect their values and vision for the future.

Gifts are invested and the interest earned pays dividends in the form of community investments.

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