

Planned Giving

Gifts of Publicly Listed Securities



Good news! Under the May 2nd, 2006 Federal Budget, effective immediately, you include none of the capital gain in your income if a donation of publicly listed securities is given directly to United Way of Greater Simcoe County. This includes most shares, bonds, warrants and segregated fund units and certain prescribed debt obligations.

You receive a charitable receipt for full market value. And your gift can go to work right away!

Life Insurance - United Way of Greater Simcoe County named as beneficiary but not owner



I've donated over years but was looking for other ways to give. I found a highly beneficial giving vehicle: a life insurance policy with United Way of Greater Simcoe County named as beneficiary. I can make a larger gift upon my death through the payment of relatively small premiums during my lifetime. It's a great way to make a difference to our communities.

Life Insurance - United Way of Greater Simcoe County named as owner and irrevocable beneficiary

Did you also know that you can convert an existing policy that you no longer need into a charitable gift? It's a great option for people who want to give but don't have significant liquid assets.

Bequest by Will



I have been careful over the years and have accumulated some resources. I plan to be generous with family, but I'd also like to leave a legacy for future generations. After speaking with my lawyer, I've decided to leave a bequest in my will to United Way of Greater Simcoe County. I believe it is important to support our communities.



Gifts of Retirement Plan Accumulations

I can name United Way of Greater Simcoe County as my beneficiary for my RRSP or RRIF and have tax credits available to my estate in the year of death. I feel good knowing I can provide a future gift, while providing for my own personal security.

Scenarios are for illustration purposes only.

For more information on United Way of Greater Simcoe County's Planned Giving opportunities, please contact Seija Suutari at 705-726-2301 ext 26

As each person's situation is unique, United Way of Greater Simcoe County recommends you contact your tax and/or financial advisor and legal counsel when considering planned gifts.