



PLANNED AND LEGACY GIVING

# Letter of Intent

In accordance with the ethical framework of the Aga Khan Development Network, a contemporary endeavour of the Ismaili Imamat to realize the social conscience of Islam through institutional action, Aga Khan Foundation Canada (AKFC) invites you and your family to participate in offering an intention of leaving a Planned and Legacy Gift.

PLEASE PROVIDE YOUR CONTACT INFORMATION

IS THIS A JOINT LEGACY GIFT?    YES    NO

MR    MRS    MS    MISS    DR

MR    MRS    MS    MISS    DR

\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME OF SPOUSE

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY

\_\_\_\_\_  
PROVINCE

\_\_\_\_\_  
POSTAL CODE

\_\_\_\_\_  
PRIMARY PHONE #

\_\_\_\_\_  
E-MAIL

\_\_\_\_\_  
ALTERNATIVE PHONE #

\_\_\_\_\_  
E-MAIL 2

WHAT IS/ARE YOUR BIRTHDAYS?

\_\_\_\_\_  
MONTH

\_\_\_\_\_  
DAY

\_\_\_\_\_  
YEAR

\_\_\_\_\_  
MONTH

\_\_\_\_\_  
DAY

\_\_\_\_\_  
YEAR

I (WE) ACCEPT AKFC INVITATION AND WISH TO BECOME A MEMBER OF THE **1967 LEGACY SOCIETY**.

I (WE) ACCEPT MEMBERSHIP BUT WISH TO REMAIN ANONYMOUS IN TERMS OF PUBLIC RECOGNITION.

The **1967 Legacy Society** is named after a milestone year, when His Highness the Aga Khan established Aga Khan Foundation as a lasting legacy of his Imamat. Becoming a member enables you to receive Planned and Legacy Giving event invitations and publications.

THIS PLANNED GIFT IS MADE IN MEMORY OF OR IN HONOR OF:

\_\_\_\_\_  
NAME



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I/We confirm the following planned gift(s) to AKFC:

A BEQUEST TO AKFC IN MY WILL OR TRUST:

IN MY/OUR WILL IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD)/ OR AS A \_\_\_\_ % OF NET RESIDUAL

IN MY/OUR TRUST IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD)/ OR AS A \_\_\_\_ % OF NET RESIDUAL

AKFC IS THE BENEFICIARY OF:

MY RETIREMENT ACCOUNT (RRSP OR RRIF) IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD)/ OR AS A \_\_\_\_ %

A LIFE INSURANCE POLICY THAT I/WE OWN IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD)/ OR AS A \_\_\_\_ %

MY DONOR ADVISED FUND IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD) / OR AS A \_\_\_\_ %

I/WE INTEND TO MAKE A FUTURE DEFERRED GIFT OF LIFE INSURANCE WITH A FACE VALUE OF \$ \_\_\_\_\_ (CAD), AND TRANSFER OWNERSHIP OF THE POLICY AKFC. I/WE CONFIRM THAT THE POLICY WAS PAID IN FULL, OR THAT WE WILL CONTINUE TO PAY FOR THE POLICY PREMIUMS IN FULL.

I/WE INTEND TO MAKE A FUTURE DEFERRED GIFT OF LIFE INSURANCE WITH A FACE VALUE OF \$ \_\_\_\_\_ (CAD)

I/WE INTEND TO MAKE A DISTRIBUTION FROM RETIREMENT ASSETS (E.G., RSP, TSFA) IN THE AMOUNT OF \$ \_\_\_\_\_ (CAD)

I/WE INTEND TO MAKE A GIFT OF APPRECIATED SECURITIES WITH AN ESTIMATED VALUE OF \$ \_\_\_\_\_ (CAD)

I/WE INTEND TO MAKE A DISTRIBUTION FROM A DONOR-ADVISED FUND OF \$ \_\_\_\_\_ (CAD)

I/WE INTEND TO MAKE A GIFT TO AKFC AS FOLLOWS (PLEASE PROVIDE DETAILS OF GIFT, AND ESTIMATED VALUE): \_\_\_\_\_

\*THE CURRENT TOTAL VALUE OF MY/OUR GIFT(S) IS \$ \_\_\_\_\_ (CAD)

*This letter of intent is revocable, will remain strictly confidential, is not legally binding, and does not replace a will.*

\_\_\_\_\_  
NAME

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME OF SPOUSE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
EXECUTOR/ FAMILY REPRESENTATIVE NAME

PLEASE INDICATE ANY DESIRES YOU MAY HAVE ON WHERE YOU WOULD PREFER TO HAVE YOUR DONATIONS APPLIED. THE FINAL DECISION WILL BE SUBJECT TO THE UNFETTERED PRIVILEGE OF THE CHAIRMAN OF THE BOARD OF AKFC.





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### SAMPLE WILL OR TRUST WORDING

#### RESIDUAL BEQUEST

“I give \_\_\_\_\_ % of the residue of my estate to Aga Khan Foundation Canada, The Delegation of the Ismaili Imam, 199 Sussex Drive, Ottawa, Ontario K1N 1K6 (Canadian Charitable Registration Number 10007 2586 RR0001), for the purpose of supporting the highest priority needs as determined by Aga Khan Foundation Canada.”

#### SPECIFIC GIFT

“I give the sum of \$\_\_\_\_\_ CAD (or transfer assets with an equal value) to Aga Khan Foundation Canada, The Delegation of the Ismaili Imam, 199 Sussex Drive, Ottawa, Ontario K1N 1K6 (Canadian Charitable Registration Number 10007 2586 RR0001), for the purpose of supporting the highest priority needs as determined by Aga Khan Foundation Canada.”

### LEGAL NAME AND TAX IDENTIFICATION FOR AKFC

The exact name you should include when leaving a legacy gift to AKFC is:

“Aga Khan Foundation Canada”  
Canadian Charitable Registration Number 10007 2586 RR0001

For more details on how to leave a legacy gift, please contact us at:

#### Planned & Legacy Giving

Aga Khan Foundation Canada  
The Delegation of the Ismaili Imam  
199 Sussex Drive,  
Ottawa, Ontario K1N 1K6  
613-237-2532 ext 124  
[legacy.akfc@akdn.org](mailto:legacy.akfc@akdn.org)

Disclaimer: The material contained within this Letter of Intent is intended to provide general information only. This material is not and should not be construed as financial, tax, legal or other professional advice. The Sample Will Wording” and other clauses in this Letter of Intent should not be used without first reviewing it with your own financial, tax and legal advisors to determine whether this language is suitable for your unique estate planning and tax situation.