



PLANNED AND LEGACY GIVING

Letter of Intent

Aga Khan Foundation Canada (AKFC) invites you and your family to document your intention to leave 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 BIRTHDAY(S)?

MONTH DAY YEAR

MONTH DAY YEAR

I (WE) ACCEPT AKFC'S 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 IV established Aga Khan Foundation as a lasting legacy of his Imamatus. 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

N.B. This document is a confidential and revocable record of each donor's personal expression of charitable intention to Aga Khan Foundation Canada and is not a legally binding agreement.



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I/We confirm our intention to give the following Planned Gifts to AKFC as part of my/our estate plan:

Type of gift:

BEQUEST IN A WILL:

- _____ % OF RESIDUE OR \$_____ (CAD) (SPECIFIC DOLLAR VALUE)
- _____ % OF LIFE INSURANCE POLICY

BENEFICIARY AND OWNER OF A LIFE INSURANCE POLICY

BENEFICIARY OF A RRSP, RRIF OR TFSA _____ % OF RRSP, RRIF OR TFSA

RECIPIENT OF A GRANT FROM MY DONOR ADVISED FUND

GIFT OF APPRECIATED SECURITIES

GIFT OF PROPERTY (RESIDENTIAL OR COMMERCIAL):

(PLEASE PROVIDE BRIEF DESCRIPTION, INCLUDING LOCATION:)

AKFC's usual policy regarding such gifts requires the executor sell the property and donate the cash proceeds. However, instead of receiving cash, AKFC may choose to take ownership of the property with the help of the executor. If AKFC takes possession of the property, the charitable tax receipt will be issued based on the property's fair market value at the time of transfer.

OTHER: _____

(PLEASE DESCRIBE)

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Value of gift:

I/We estimate the current total value of our Planned Gift to AKFC is \$ _____ (CAD).

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

SIGNATURE

DATE

SIGNATURE OF SPOUSE

DATE

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 BOARD OF AKFC.

Share your Story

Please take a moment to tell us about your connection to the Aga Khan Foundation or to other agencies of the Aga Khan Development Network. In particular, we would like to know what motivated you to consider leaving a future gift to Aga Khan Foundation Canada. Your story may inspire future generations to continue the legacy of giving to the Foundation, and thereby create an even greater lasting impact of your generosity.

Please write as much as you wish to share. Thank you!

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SAMPLE WILL WORDING

RESIDUAL BEQUEST

"I give _____% of the residue of my estate to Aga Khan Foundation Canada (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 \$ _____ to Aga Khan Foundation Canada (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 RR 0001)

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
647-237-2532 ext 124
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.

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