



“Learning for Life”

THE LOYALIST COLLEGE FOUNDATION

ESTABLISHED 1995

A Guide to Planned Giving

“You Can Make a Difference”

Contribute to the excellence of the College’s programs and provide important financial assistance to deserving students.

I would like more information about Planned Giving opportunities:

- Bequests Life Insurance Annuities
- Endowment Program for Student Awards or Programs

Name _____

Address _____

City _____ Province _____

Postal Code _____ Tel _____

Email _____

Return to:

The Loyalist College Foundation

P.O. Box 4200, Belleville, ON K8N 5B9

or contact us at:

Tel: 613-969-1913, ext. 2235

Fax: 613-969-7902

Email: dspencer@loyalistic.on.ca

ation **TEAMWORK PASSION** ideas **SKILLS**
MENTORSHIP SUCCESS Diversity **INDIVIDUALITY**
CONFIDENCE Inspire **IMAGINE Challenge**
TE CREATE intelligence **ASPIRE** decisions
ELOP Values **THEORIES LEARN CURIOSITY**
CATION Teamwork **PASSION ideas SKILLS**



“Learning for Life”

THE LOYALIST COLLEGE FOUNDATION

ESTABLISHED 1995

If you are interested in discussing your options for making a Planned Gift to Loyalist College, or in providing other support for College programs, please call the Foundation Office at 613-969-1913, ext. 2235.

PROTECTING YOUR PRIVACY

We protect your personal information and adhere to all legislative requirements with respect to protecting privacy.

YOU CAN MAKE A DIFFERENCE

A GUIDE TO PLANNED GIVING

e **CREATE intelligence** **ASPIRE DECISIONS**
GOALS DEVELOP VALUES **THEORIES Goals**
EDUCATION TEAMWORK passion **IDEAS**
mentorship **BOOK A CAMPUS TOUR learn**
QUALITY LEADERSHIP confidence **INSPIRE**
Challenge **MOTIVATE CREATE** intelligence
SIONS become a student for a day **Aspire**
velop **VALUES theories** **LEARN CURIOSITY**
CATION Teamwork **Passion IDEAS skills**
MENTORSHIP Success DIVERSITY Individuality
CONFIDENCE MEET OUR FACULTY ideas
challenge **MOTIVATE create INTELLIGENCE**
DECISIONS GOALS Develop **VALUES theories**
Curiosity Education TEAMWORK **PASSION**
SKILLS MENTORSHIP success **DIVERSITY**
QUALITY leadership CONFIDENCE Inspire
Challenge Motivate CREATE intelligence
DECISIONS Visit loyalistcollege.com LEARN
VELOP Values THEORIES learn CURIOSITY
CATION teamwork **PASSION IDEAS skills**
MENTORSHIP Success DIVERSITY Individuality
CONFIDENCE INSPIRE Imagine CHALLENGE
ite CREATE Intelligence **ASPIRE decisions**
VELOP **VALUES theories LEARN Curiosity**
CATION TEAMWORK **Passion IDEAS SKILLS**



THE LOYALIST COLLEGE FOUNDATION



The Loyalist College Foundation supports the programs and students of Loyalist College through various fundraising programs and events.

The Foundation Board is made up of individuals from the community and the College, who have a special interest in the long-term development of Loyalist. Established in 1995, the Foundation supports students with an awards program sustained through an endowment fund which has grown appreciably over the past few years.

PLANNED GIVING

Individuals interested in providing a lasting legacy are invited to consider the possibilities of making a planned gift to Loyalist College through the College Foundation. Planned Giving options provide you with the opportunity to provide for your family and loved ones while planning a gift to the College as part of your estate plan. Significant tax savings are also possible.

A BEQUEST

A gift in a will is the most common way to make a planned gift to a charity. When you specify Loyalist College as a beneficiary in your will, you are providing important future support for students or programs. You can specify where you would like your gift to be directed in terms of program or student support. You should discuss the options you are interested in to ensure that your wishes can be met. Contact the College Foundation for more information.

LIFE INSURANCE

Gifts of life insurance may allow individuals to make a major gift at modest cost. If a policy is paid up, it can be donated to the College by assigning to the College Foundation as the owner and beneficiary. The donor is provided with a tax receipt for the full cash surrender value of the policy. If you are still paying premiums on a policy which you have transferred to the Foundation, you will receive charitable donation receipts for the premiums paid. You can also purchase a new policy on your life in the name of the College Foundation as owner and beneficiary. In this case, all premiums paid by you are deemed to be a charitable gift and as such are tax deductible. If you merely designate the Foundation as the beneficiary on your life insurance, the premiums are not tax deductible but the proceeds payable on your death will go to the Foundation and your estate will receive a charitable donation receipt for the proceeds.

ANNUITIES

An annuity plan can be set up whereby the income from your donation will be paid to you or your spouse during your lifetime. The capital remaining after your death is available to the Foundation to use in the manner you wish. This provides a donor with the opportunity to make an important gift of capital while continuing to receive income from the capital during the lifetime of the donor and spouse. An income tax receipt is also provided at the time of the annuity donation, based on the value of the gift for tax purposes.

AN ENDOWED GIFT

The Loyalist College Foundation administers an Endowment Fund which provides for awards in perpetuity to College students. Funds are held in trust and paid out from investment income on an annual basis, based upon criteria established by donors. Individuals can specify a program or a specific student award, in discussion with the College Foundation. Donors will be recognized in College publications, with particular naming opportunities at specific levels of giving. Requests for anonymity will of course be respected.

GIFTS-IN-KIND

A gift of property such as securities, real estate, artwork or equipment, can be made to Loyalist College through the Foundation. These gifts can be deferred as a planned gift, but are still eligible for a charitable receipt for the fair market value of the gift. Arrangements for the continued use of the gift during a donor's lifetime can be made with the Foundation, for the benefit of both the donor as well as the College.