



Wild Species and Wild Spaces in Ontario – Forever

Thank you for your interest in leaving a legacy to our wildlife and wild spaces in Ontario through Ontario Nature. We protect wild species and wild spaces through conservation, education and public engagement. With the support of thousands of men, women and children, we protect nature, connect naturalists with each other, advocate for wild species and wild spaces and educate citizens of Ontario about our province's stunning, but disappearing natural heritage.

Over the years, many generous donors have left a legacy to Ontario Nature (formerly The Federation of Ontario Naturalists). These dedicated supporters joined our **For Nature Forever Circle**, wanting to ensure that our work to protect Ontario's spectacular biological diversity would continue for as long as necessary. We deeply appreciate the lasting gifts left by these special people.

Because a legacy is the most personal gift you will make, you will want to proceed carefully. Of course, you'll want to look after your family first. But after these commitments are made, you can leave a gift to nature.

Since we do not have all the answers about the intricacies involved, we strongly advise you to talk to a lawyer or estate planner before confirming your legacy to Ontario Nature. We would be happy to provide a list of lawyers and estate planners from which to choose.

Legacy Options

Here are some of the legacies you could leave to Ontario's wild species and wild spaces.

1. A Gift in your Will (A Bequest)
2. A Charitable Annuity
3. Other Legacy Gifts
 - a. A gift of life insurance
 - b. A gift of stocks and/or securities

- c. A gift of property, art or other assets
- d. A gift of retirement funds
- e. A gift of residual interest

A Gift in your Will (A Bequest)

Over 95% of the legacies received by Ontario Nature are bequests in a Will. Bequests come in two forms: residual and specific. A residual bequest provides Ontario Nature the residue, or a share of the residue, after all specific bequests have been made. Normally, this results in a larger legacy gift for nature in Ontario. A specific bequest provides the organization with a specific cash gift.

Because there many environmental organizations in Ontario, it is important that the wording in your Will be precise. Please ensure that you specify your bequest is for **Federation of Ontario Naturalists**.

Here is some sample language you can use to start your discussion with your lawyer: *“I direct my Estate Trustee to pay the Federation of Ontario Naturalists the sum of (specific amount) to be used for such purposes as the Federation and its Board of Directors may from time to time determine.*

A Charitable Annuity

Many of our supporters are seniors so we want to highlight this legacy gift. If you are over 55 years old, you can make a substantial gift to the organization and receive some income yourself.

An annuity allows you to see the benefits of your legacy for many years before you die. On your death, the principal amount of the money is paid to Ontario Nature and your estate receives a tax benefit.

Other Legacy Gifts

You can make many other legacy gifts. While we are happy to talk about these in general terms, lawyers and/or estate planners will be immensely helpful.

For instance, you can make Ontario Nature the beneficiary of your life insurance policy. Exempt from probate, gifts of life insurance immediately go to the organization on your death.

In addition, gifts of publicly traded stocks and securities can provide a major gift to Ontario's wild species and wild spaces and provide a significant tax advantage to the donor.

The federal government has exempted all gifts of publicly-traded stocks or securities from capital gain taxes. This provides a tremendous advantage if you are considering donating stocks or securities.

Indeed, many legacy gifts provide tax advantages. It is our experience that, while the main reason for a legacy gift is your commitment to nature in Ontario, you will also want to maximize any tax advantages.

Conclusion

We are very touched that you are considering including Ontario Nature as part of your estate plans. This may be the most significant gift you make in your lifetime and we want to make it right for you.

For more information about leaving a legacy to Ontario Nature, please call Kirsten Dahl at 416-444-8419 ext 235 or email Kirsten at kirstend@ontarionature.org.

On behalf of the wild species and wild spaces in Ontario we have helped in the past, we are helping now, and we will help in the future, thank you for your interest.

Sincerely,



Kirsten Dahl
Manager of Planned and Major Giving

Your legacy today will make a difference tomorrow.