



Easy Ways You Can Make a Lasting Impact:

Gifts That Cost You Nothing Now

Protect the future of CoSA Ottawa with gifts in your **Will** and by **bequest**

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Gifts That Benefit Your Loved Ones

Provide for your family and heirs in addition to CoSA Ottawa with a gift of **life insurance**

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Other Ways to Give

Safeguard CoSA Ottawa's future with gifts in **memory** and **tribute**

or gifts from donor-advised funds

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Declaration of Intent

Tell us about your gift on the attached form

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Gifts That Cost You Nothing Now

To create your legacy for CoSA Ottawa, you simply sign your name. That's how easy it can be to include a gift in your Will. It costs you nothing now, but your impact goes on for generations ensuring 'no more victims' with CoSA Ottawa.

Once your family and friends are provided for, please consider making your concern for CoSA Ottawa part of your life story with your legacy gift.

Gifts in a Will

When you remember CoSA Ottawa with a gift in your Will, you make a lasting contribution to our work. Your legacy gift will drive the most urgent priorities for CoSA Ottawa.

Here Are the Ways Most People Like to Make This Lasting Gift:

Residual Bequest

CoSA Ottawa receives a percentage of the remainder or residue of your estate after other specific legacies have been fulfilled. This gift will be used where it's needed most. A lot of people prefer to give a residual gift as it keeps in line with inflation and does not lose value over time.

Specific Bequest

CoSA Ottawa receives a specific dollar amount or a specified gift in kind (property, collections, books, jewelry, and so on). Gifts in kind will be sold and proceeds will be used for CoSA Ottawa where it's needed most.

***See Sample Bequest and Codicil Language. Page 3**

The One-Minute Bequest

Now it's easier than ever to create your legacy of care and concern for CoSA Ottawa. You can do it with the One Minute Bequest.

It takes only a few minutes of your time. It costs you nothing to make this gift that will safeguard CoSA Ottawa for years to come. And it doesn't require assistance from lawyers or advisors (although you can and should feel free to consult with experts before making any donation). The only thing you need is a Registered Retirement Savings Plan, a Registered Retirement Income Fund or Life Insurance.



"Because I'm accountable, I know if I do offend it's going to affect a lot more people than just me."



Here’s How the One Minute Bequest Works:

Step 1

Request a Multiple Beneficiary Designation Form for your Registered Retirement Savings Plan, your Registered Retirement Income Fund or life insurance policy from the administrator of your plan.

Step 2

Fill out the form and name CoSA Ottawa as one of the beneficiaries.

Step 3

Return the form to your plan administrator.

It’s that easy. In just three steps, you can make a gift to CoSA Ottawa that costs you nothing now, powers the most urgent priorities facing CoSA Ottawa, and continues its impact for generations to come.

Sample of Bequest Language - For A New Will

I hereby give, devise and bequeath \$ _____ OR ____ % OR ____ all of the remainder of my total estate to CoSA Ottawa, 207A – 211 Bronson Avenue, Ottawa, ON K1R 6H5, for its charitable uses and purposes.

Sample Codicil Language - Addition to An Existing Will

I hereby give, devise, and bequeath \$ _____ OR ____ % OR ____ all of the remainder of my total estate to CoSA Ottawa, 207A – 211 Bronson Avenue, Ottawa, ON K1R 6H5 for its charitable uses and purposes. In all other respects, I ratify and confirm all of the provisions of my said last Will and Testament dated on the _____ day of _____, 20____.

IN WITNESS WHEREOF, I sign, publish, and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this _____ day of _____, 20____.

(name)

(signature)

Witnesses:

(name)

(signature)

(name)

(signature)



Gifts That Benefit Your Loved Ones Too

You can make a gift that will protect the future of CoSA Ottawa for generations to come and, at the same time, provide for your family and heirs.

Life Insurance Gifts

A gift of life insurance lets you support CoSA Ottawa in a significant and meaningful way. By paying modest life-insurance premiums today and naming CoSA Ottawa as a beneficiary, you can make an impactful gift that will demonstrate your commitment to CoSA Ottawa's work.

One way to leave this gift is to assign CoSA Ottawa as the beneficiary of your own policy or the life insurance policy from an employer. Your estate will receive a tax receipt equal to the direct benefit to CoSA Ottawa. In this way, you create your legacy and benefit your heirs through a significant tax reduction.

A second option is to purchase a new policy, name CoSA Ottawa as owner and receive tax receipts, during your lifetime, for any premiums paid after the date of transfer. In this way, you know that the full value of your estate will still go to your family while at the same time, CoSA Ottawa will receive the proceeds of the life insurance as your gift to them.

"CoSA has done so much for me in so many different ways. Thank you for being there when no one else was."

"CoSA has shown me what love feels like."





Other Ways to Give

You have even more options available to create your legacy for CoSA Ottawa. Your generosity will safeguard CoSA Ottawa's work today and tomorrow for future generations to benefit.

Gifts of Stocks and Securities

Donating publicly traded stocks and securities provides a tax-advantageous way to support CoSA Ottawa. When you make a gift of stocks, you receive a tax receipt for the fully appreciated value of your gift, and will not have to pay tax on realized capital gain. The receipt value will reflect the closing price on the date stocks are received by CoSA Ottawa. The standard capital gain inclusion rate of 50 percent on selling shares is eliminated when you transfer your shares to CoSA Ottawa rather than selling the stocks and donating the proceeds. You may transfer publicly traded stocks and securities electronically from your brokerage account to CoSA Ottawa's brokerage account. Simply provide a completed Letter of Instruction to your broker and ask that they transfer your shares to CoSA Ottawa. For more information about donating publicly traded stocks and securities to CoSA Ottawa, please contact the CoSA staff at admin@cosa-ottawa.ca.



"CoSA saved me."

"My circle helped me to understand the impact of my choices and to find that I could make different one. This was big for me."



Declaration of Intent

Thank you for naming CoSA Ottawa in your Will or estate plan and making a difference to our community for years to come!

We would love to know what inspired your thoughtful commitment. The information you provide here will ensure that we have accurate records so that we can provide the best possible stewardship of your gift. This is not a binding legal document, and your information will be kept confidential.

If you have questions, please contact CoSA Ottawa at 613 288-2284 or admin@cosa-ottawa.ca.

Tell Us About Your Gift

We would love to know what inspired you to thoughtfully include a gift in your Will or estate plan to CoSA Ottawa.

Signing date of your Will: _____

I have supported CoSA Ottawa through the following type(s) of deferred gift:

- Gift in Will
- Life Insurance Policy
- Beneficiary to RRSPs, RRIFs, donor-advised funds or other registered products
- Gifts of stocks or securities
- Other

Is this gift revocable or irrevocable?

- This gift is revocable (can be changed)
- This gift is irrevocable (cannot be changed)

Is this a residual share or specified amount?

- This gift is a residual share (or percentage)
- This gift is a specific amount
- Prefer not to say

Circles of Support and Accountability – Ottawa

211 Bronson Ave, Unit 207A, Ottawa, ON K1R 6H5 (613) 288-2284

admin@cosa-ottawa.ca www.cosa-ottawa.ca

Registered Charity # 81642 2539 RR0001



Have you planned this gift in honour of someone?

- Yes
- No

With your generous gift commitment, we are pleased to welcome you to CoSA Ottawa's *Legacy Champions*. As a token of our appreciation, we would like to send you a letter of gratitude from our Board President, and we would like to keep in touch with CoSA Ottawa's related news and invitations that will bring you closer to our work.

Please include your contact information below:

First Name _____

Last Name _____

Address 1 _____

Address 2 _____

City _____ Prov _____

Postal Code _____ Phone _____

Email _____

Thank you so much for considering your generous gift.

We look forward to welcoming you as a CoSA Ottawa Legacy Champion!