

Leave a Natural Legacy for future generations.



Close to nature.
Close to home.

THE BRUCE TRAIL
CONSERVANCY

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Leaving a Natural Legacy

PLANNED GIVING



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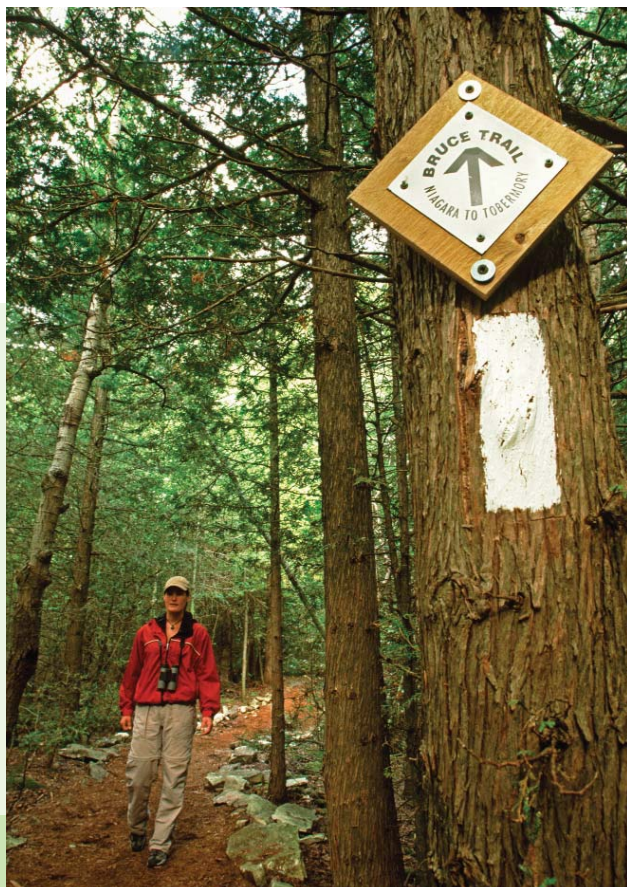
THE BRUCE TRAIL
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The Bruce Trail Conservancy

Our Mission Statement

The Bruce Trail Conservancy is a charitable organization committed to establishing a conservation corridor containing a public footpath along the Niagara Escarpment, in order to protect its natural ecosystems and to promote environmentally responsible public access to this UNESCO World Biosphere Reserve.

For over 40 years visionaries, volunteers, members and donors have worked diligently to support the mission of The Bruce Trail Conservancy. Because of their generosity, The Bruce Trail Conservancy is now one of Ontario's largest land trusts, protecting and stewarding over 2596 hectares of Escarpment land.



Many individuals support The Bruce Trail Conservancy generously throughout their lifetimes. Planned Giving allows you to create a lasting, living legacy and will help create a sustainable future for your children and grandchildren, your community and the planet.

Planned Giving is a thoughtful approach to charitable giving that assists you in achieving your philanthropic objectives while minimizing tax implications and maximizing other financial benefits.

Planned Gifts are the ultimate expression of your values. Importantly, these gifts allow The Bruce Trail Conservancy to prepare for future conservation and land acquisition programs. They ensure The Bruce Trail Conservancy will have the needed funds to carry out our critical mission of a secure Conservation Corridor along the Niagara Escarpment.

There are several ways to make a Planned Gift to The Bruce Trail Conservancy:



Bequest – A Bequest is a gift to The Bruce Trail Conservancy in your Will. There are a number of ways that you can make a bequest to The Bruce Trail Conservancy:

General - this indicates within your Will a specified amount of money;

Specific - this indicates within your Will that a specific piece of property be left to The Bruce Trail Conservancy;

Contingent - this occurs when a beneficiary identified in your Will has not survived you;

Residual - this indicates that within your Will all or a percentage of your estate or a particular asset, after other bequest have been made be left to The Bruce Trail Conservancy.

Gifts of Life Insurance – A gift of life insurance can become a gift of much greater value than the actual money expended when the policy is given to The Bruce Trail Conservancy. There are three different giving opportunities available with life insurance:

- A supporter can contribute “paid up” policy to The Bruce Trail Conservancy and receive a tax receipt for the cash surrender value;
- A support can name The Bruce Trail Conservancy as owner and beneficiary of a new policy and receive tax receipt(s) for the value of premiums paid;
- A supporter can name The Bruce Trail Conservancy as beneficiary only of a policy. There are no tax benefits for either the donor or the donor’s estate.

Charitable Remainder Trust – The Charitable Remainder Trust is a form of a residual interest gift. The donor transfers property to a trustee (the BTC) who then holds and manages the property. If the property is income

producing, the net income will be paid to the donor and/or other named beneficiary. When the trust terminates (either at the death of the beneficiary (ies) or after a term of years), the trust remainder is distributed to the BTC. The trust is irrevocable and the donor is entitled to a gift receipt.

Residual Interest Gifts – The Residual Interest Gift is an arrangement under which the property is irrevocably committed to The Bruce Trail Conservancy, but the donor retains the use of the property, or the income from the property, for life. A tax receipt can be issued for the discounted value of the residual interest. The value of the residual interest is actuarially determined, taking into consideration the market value of the property, current interest rates, and the life expectancy of the person or persons who retain an interest in the property.

Gifts-in-Kind – Gifts-in-Kind are non-cash gifts. They could be donations of property such as real estate, stocks and bonds, or art collections. When a gift-in-kind is donated to the Bruce Trail Conservancy, a qualified party must appraise the value of the gift. Based on the evaluation, the donor is eligible for a tax receipt for the appraised amount.

Gift Annuities – The Gift Annuity is a contractual arrangement whereby a donor transfers assets to The Bruce Trail Conservancy in exchange for fixed, guaranteed payments for the life of the annuitant(s) or for a term of years. Determination of the gift receipt and taxation of annuity payments will be in accordance with Interpretation Bulletin IT-111R2 issued by Revenue Canada.

Your Planned Gift can go towards one of the following funds:

Support The Bruce Trail Conservancy Mission: Your donation directly supports The Bruce Trail Conservancy's mission to protect and promote a Conservation Corridor along the Niagara Escarpment containing the Bruce Trail. Gifts contribute to land acquisition, land stewardship, trail maintenance, publicity, and other vital programs.

Endowment Fund: Donations to this fund are held in perpetuity and generate a permanent source of income for the BTC. Only the interest from the Endowment Fund is used to support BTC projects and programs.

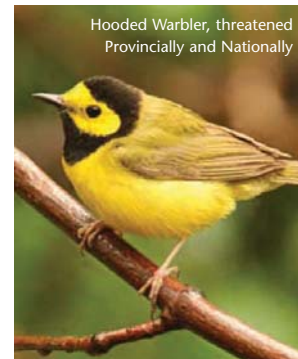
How your Planned Gift can be recognized.

Heritage Club

The Heritage Club gives The Bruce Trail Conservancy an opportunity to acknowledge the commitment and support of donors who have made a Planned Gift to the Bruce Trail Conservancy. This enables us to celebrate the value of your future gifts during your lifetime. Allowing the Bruce Trail Conservancy to thank you publicly also helps to inspire others to make a similar gift. Planned Giving donors may, of course, choose to remain anonymous.

Donor Recognition

The Bruce Trail Conservancy recognizes the importance of donor contributions. At the Bruce Trail Conservancy's annual donor recognition evening, certificates, plaques and keepsakes are presented to donors in appreciation of their generosity. Permanent bronze plaques are erected along the Trail or at a Donor Pavilion to recognize major donors.



Yes, I want to leave a Natural Legacy for future generations.

MISS MS. MRS. MR.

Name

Address

City

Province

Postal Code

Telephone

Email

Member No. (if applicable)

- I am interested in making a Planned Gift to The Bruce Trail Conservancy.
- I have made a bequest to The Bruce Trail Conservancy in my will.
- I would like to become a Heritage Club member.

I would like to be contacted by The Bruce Trail Conservancy in regards to my Planned Gift.

Yes No

For more information, please contact:

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