

Does Your Will Work?

Some wills won't. For example, if your province requires the signatures of two disinterested witnesses and a beneficiary of your will signs as a witness, your will may not work.

Also, a will that's out of step with your other estate planning documents may not work either. Let's say your will dictates that your entire estate is to pass to your spouse and yet your life insurance policy indicates a different beneficiary. Does your will supersede your policy and redirect the insurance proceeds to your spouse? Probably not.

An out-of-date will that fails to take full advantage of current tax law may not work well either. It could cost thousands in added taxes. Nor can you feel confident in a will that has not been updated to reflect major changes in your family life or financial affairs.

Does your will accomplish everything you want? Is it up-to-date? Is it valid? Do you even have a will?

We at ABC Charity want you to have the peace of mind that comes from knowing that you have a valid estate plan. We want you to have a will that works well for you. And, frankly, one that works for us -- one that includes a bequest to ABC Charity.

It's amazing how often people say, "I never thought about making a charitable gift through my will. It just never occurred to me."

When you name ABC Charity in your will to receive a specific amount or a percentage of your estate, you make one final gift -- perhaps your ultimate gift -- to an organization you have supported during your life. You declare in your Last Will and Testament that you believe in the mission of ABC Charity and that you want a portion of your accumulated assets to be invested in furthering the good work of this worthy cause.

If you have arranged for an estate gift through a will or other transfer document, we would like to know so we can thank you while you are here. We want to express appreciation for your confidence in our future.

We want to honour you for your prudent planning. Of course, if you wish, we can also treat news of your deferred gift anonymously.

The coupon below is one way you can let us know of your gift plan. You can also use this form to request free literature about making a will that works. If you want to talk with a representative of ABC Charity about your gift and estate plans, you can indicate that as well.

As always, we urge you to consult with an estate planning lawyer or other qualified advisor regarding a will, a living trust or whatever else may best suit your needs. Sound professional help will contribute to your peace of mind -- and your family's.

Please take a moment to fill out and return the coupon. We look forward to hearing from you soon.

(Please complete and return this reply form)

Dear Friends at [ABC] Charity:

- ☐ Please send me free literature about making my will work.
- ☐ Please contact me about a personal visit or other assistance.
- ☐ I have already provided a bequest for [ABC] Charity in my will.
- ☐ Please send me information about the [ABC] Heritage Society.

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Phone: _____

Email: _____