

Giving always has a double blessing attached to it; the recipient experiences the joy of new doors opened and new opportunities realized.

The givers discover the reward of being part of something bigger than themselves, and creating a legacy that will be an investment for eternity, even after they have gone.

Planned giving balances the needs of your loved ones with an opportunity to support the ministry of Samaritan's Purse Canada which exists to share the Gospel of Jesus Christ by providing physical and spiritual aid to hurting people.

To help you with the process of planning your Will, we've established a partnership with Advisors with Purpose. This free service gives you access to professional estate specialists, whose planning tools and information will help you be a good steward of all God has given you—all at no charge to you.

For more information, please visit [SamaritansPurse.ca/planned-giving](http://SamaritansPurse.ca/planned-giving) or call 1.800.663.6500.

We have outlined a variety of financial options here to demonstrate how you can use your present and future assets to partner with us in being a good Samaritan to people in need.

*"Let my heart be broken with the things that break the heart of God"*

– Dr. Bob Pierce, founder of Samaritan's Purse



## Our Mission

Samaritan's Purse Canada is a non-profit, Christian organization that exists to provide compassionate and cost-effective assistance to anyone who needs it, regardless of religion, race, gender, or socio-economic standing, in the Name of Jesus Christ.

For more information or assistance with planned giving, please contact a Donor Ministry representative.

**Phone:** 1.800.663.6500

**Fax:** 1.888.232.9633

**Email:** [info@samaritan.ca](mailto:info@samaritan.ca)

**Website:** [SamaritansPurse.ca](http://SamaritansPurse.ca)

CHANGE LIVES WITH THE HOPE OF JESUS CHRIST

planned  
*Giving*



*"All we have comes from God and we give it out of His hand." | Chronicles 29:14b, Dutch paraphrase.*

  
**Samaritan's Purse®**  
INTERNATIONAL RELIEF

# Planned Giving Opportunities

## Annuities

When you donate a capital sum to a charity to purchase an annuity, the charity in turn guarantees you regular payments at a very attractive rate for the rest of your life. All, or a large portion, of your annuity income is tax exempt and you will receive a tax-deductible receipt for at least 20 per cent of the original annuity amount.

## Appreciated Securities

You can donate various kinds of property by various means. Some of the greatest tax benefits will be available to you if you give stocks, mutual funds, and bonds directly to your chosen charity. This process eliminates taxable capital gains on the donation and provides a full market value tax receipt.

## Retirement Accounts

Retirement assets provide for you when your income declines at retirement. Many people discover they have accumulated more funds than they will use. Excess retirement funds can turn into another tax liability, especially if these funds are in a tax sheltered registered plan.

When you pass away, these funds become part of your estate and are taxable. You can offset the taxes if the funds are given to a charitable organization like Samaritan's Purse Canada (SPC). You can also now name a charity as a second beneficiary of your registered accounts, avoiding estate implications.

## Life Insurance

You can donate an existing policy or purchase a new policy, and then choose SPC as the owner and beneficiary. You can maintain that policy by paying the premiums and receiving a donation receipt annually for the premiums paid. Or you could name SPC as a beneficiary or co-beneficiary and, at your passing, your estate would receive a donation receipt to be used as a tax credit.

You could also donate an existing policy that you no longer need; you would continue to make the payments and receive a tax credit, similar to one of the above options. If that policy has cash surrender value, the charity could alternatively cash it in and issue you a donation receipt.

## Real Estate

Donating real estate offers significant tax advantages. When real estate that has increased in value is sold, tax will have to be paid on the capital gains if the property is not your principle residence.

By gifting the property, a donation receipt is generated and the tax credit would offset additional tax and provide a net tax saving. If the gift is your principle residence, there is no capital gains tax and the donation receipt can be used to offset other taxes.

You can also gift real estate and maintain income from it or reside in it for an agreed amount of time or until your passing. Real estate can also be left as a bequest in your Will.

## Wills

A Will is the cornerstone of any financial plan, and is the last communication you have with your family. It is a time to confirm to them and others what your priorities and values in life were.

A gift to the ministry of SPC designated through your Will enables you to honor the Lord at the end of your life as you have throughout your life. That gift will result in a tax credit, defraying taxes owing on your estate.

As the Lord has blessed you with increased assets, you can designate in your Will a percentage of your assets to go to ministry as well as to care for your family.

Each of these planned giving options needs careful attention and prayerful consideration. If you would like to talk to a professional financial advisor, access valuable planning tools, or learn more about how your planned giving can support the ministries of SPC, please contact us or visit our website [SamaritansPurse.ca/planned-giving](http://SamaritansPurse.ca/planned-giving).

These services are all free of charge. We would be pleased to help you find the right balance in planning your legacy.

*"If anyone gives even a cup of cold water to one of these little ones...truly I tell you, that person will certainly not lose their reward"* (Matthew 10:42, NIV).