

## **I would like to include the Canadian Mining and Metallurgical Foundation (CIMF) in my last will and testament**

Making a bequest (designating a charity in your last will and testament) can reduce your estates' fiscal burden while providing your beneficiaries with the opportunity to accomplish more with a greater gift. For instance, if you have securities that have accrued capital gains, your executor can simply transfer these securities directly to the charity(ies) listed in your last will and testament and this will exempt your beneficiaries of the capital gains tax related to those securities. The total value of your gift is based on the closing trading price on the day the transfer is made. A receipt for income tax purposes is then issued to your estate for this same amount. CIMF will provide your executor with an easy to complete form related to this type of gift.

### **Your Contact Information**

<b>Name:</b>
<b>Address:</b>
<b>City, Province, Postal Code:</b>
<b>Home phone:</b>
<b>Business phone:</b>
<b>Email address:</b>

### **Your legacy**

The nature of my legacy gift is as follows:

- ☐ My will contains a bequest of \$ \_\_\_\_\_ or \_\_\_\_\_% of my estate, or \_\_\_\_\_% of the residue of my estate.
- ☐ I have named CIMF as the:
  - ☐ beneficiary of a (circle one) life insurance policy / RRSP / RRIF in the amount of \$ \_\_\_\_\_.
  - ☐ owner and beneficiary of a life insurance policy in the amount of \$ \_\_\_\_\_.

Gift Recognition:

Thank you for including CIMF in your last will and testament. When your gift is finalized, with your permission, we would like to recognize your generosity in our publications. The nature and amount of your gift will always remain confidential.

- ☐ I wish to be recognized as:

- ☐ I prefer to remain anonymous.

### **Making a Bequest / CIMF Contact Information**

Please inform Deborah Smith-Sauvé, Manager, CIMF, of your intent to include CIMF in your last will and testament. She can answer questions that you may have about bequests to CIMF including special designated gifts. She can be reached at:

Deborah Smith-Sauvé, Manager
CIMF, 3500 de Maisonneuve Blvd. West, Suite 1250, Westmount, Québec H3Z 3C1
(514) 939-2710 ext. 1334 (phone), (514) 939-2714 (fax) <a href="mailto:dsauve@cim.org">dsauve@cim.org</a> (email)