

GIVING OPTIONS

Did you know that you have several options on how to give to the Technion and other charities that are important to you? A Legacy Gift allows you to make charitable contributions to those organizations, like Technion, that you care most about. Here are different ways to designate your gift.



YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
BEQUEST	<ul style="list-style-type: none"> • Maintain control and use of your assets during your lifetime • Preserve the ability to make modifications to your gift 	A gift in your will can be a specific dollar amount, a percentage of your estate, securities or other property. Simply name Technion Canada as a beneficiary in your will. Sign a letter of intent to direct your bequest.	<ul style="list-style-type: none"> • Tax deduction in your final return or estate return • Life use and ownership of your property
LIFE INSURANCE	<ul style="list-style-type: none"> • Guarantee a specific gift amount • Reduced current cash outlay supporting larger future gift 	Purchase a new policy or transfer an existing policy you no longer need and name Technion Canada as owner or as beneficiary of an existing policy.	<ul style="list-style-type: none"> • Maintain control and use of your assets during your lifetime • Preserve the ability to make modifications to your gift
CASH OR SECURITIES	<ul style="list-style-type: none"> • Make a gift to your community now • See the benefits of your gift during your lifetime 	Make a gift via cheque, transfer stocks, bonds or mutual funds via your broker. The gift will be held as an endowment to benefit future generations.	<ul style="list-style-type: none"> • Charitable deduction for ongoing premiums paid • Make larger gift than you thought possible • Possible donation tax receipt for gifts of existing policies
CHARITABLE REMAINDER TRUST (CRT)	<ul style="list-style-type: none"> • Retain access to investment income stream • Receive the benefit of tax savings from a partial charitable deduction 	Transfer cash or property to fund a CRT. The trust provides you with income for life or a term of years. After your life, the property in the trust transfers to the charities of your choosing.	<ul style="list-style-type: none"> • Partial charitable deduction • Income for life or a term of years • Possible income growth over time
OTHER OPTIONS	<ul style="list-style-type: none"> • Use an existing vehicle to direct your afterlife gifts • Give other non-traditional assets (gifts of real property and gifts or private company shares) 	If you have a donor advised fund or a private foundation, you can designate the remainder or a percentage for endowment.	<ul style="list-style-type: none"> • Simplicity and flexibility for donor advised fund gifts • Tax advantages for more complex gifts

These descriptions are informational only and do not constitute legal or tax advice. Please consult with a tax or estate professional to understand how a specific gift vehicle will impact you.