

Sample Bequest Language

A Legacy of Light and Hope

St. James Anglican Church, Kemptville

The following sample wording is provided for discussion with your lawyer or estate planning professional. Every estate is unique, and you should seek independent legal advice when preparing or updating your will.

Option 1

Unrestricted Bequest to St. James Anglican Church

An unrestricted gift provides St. James with the greatest flexibility to respond to future opportunities and needs.

Suggested wording:

I give to St. James Anglican Church, Kemptville, Ontario, charitable registration number 131893190RR0001, the sum of \$_____ (or _____% of the residue of my estate, or the residue of my estate) to be used for its general charitable purposes. Unless otherwise directed by the Parish Corporation, this gift shall be added to the St. James Strategic Reserve to support the ongoing mission and ministry of the parish.

Option 2

Endowment Gift Through the Anglican Foundation of Canada

An endowed gift creates a permanent source of support for St. James Anglican Church.

The original capital is preserved by the Anglican Foundation of Canada, while annual income is disbursed to St. James to support its ministry.

Suggested wording:

I give to the Anglican Foundation of Canada, charitable registration number 11921 2405 RR0001, the sum of \$_____ (or _____% of the residue of my estate, or the residue of my estate) to be held as an endowed fund for the benefit of St. James Anglican Church, Kemptville, Ontario. The capital of this gift shall be maintained in perpetuity, and the income to be paid annually by the Anglican Foundation of Canada to St. James Anglican Church in support of its mission and ministry.

Recommended Flexibility Clause

To ensure your charitable wishes can continue to be honoured if circumstances change over time, we recommend including the following clause:

If, in the opinion of the Board of Directors of the Anglican Foundation of Canada, it becomes impossible, impractical, or inadvisable to carry out the purpose of this gift exactly as described, including if St. James Anglican Church, Kemptville, no longer exists, the Board may apply the fund in a manner that most closely reflects my original charitable intent, giving preference to Anglican ministry within the Diocese of Ontario.

Questions?

If you are considering including St. James Anglican Church in your estate plans, we would be pleased to answer your questions or connect you with the Anglican Foundation of Canada to discuss the option of creating a parish endowment fund.

David Finnie & Stephen Willetts
Co-Chairs, *A Legacy of Light and Hope*

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The information provided here is intended as a guide only and does not constitute legal or financial advice. Please consult your lawyer or estate planning professional when preparing or revising your will.

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