

## **PLANNED DONATION**

Planned donation is a noble and forward-thinking act that enables individuals to leave a meaningful legacy while supporting a cause that holds personal significance. We invite you to take the time to consider how you can help shape the future through a planned gift.

The Fondation Jean Lapointe is honoured that you are considering supporting its mission in such an exceptional and lasting manner.

### **What is Planned Donation?**

**Planned donation** refers to a philanthropic commitment made in the present to benefit a charitable organization in the future. Typically arranged through a [will, life insurance policy, or other financial instruments](#), planned donations are often realized after the donor's passing but may also take effect during their lifetime.

This form of giving allows donors to make a significant contribution to the long-term sustainability of the Fondation Jean Lapointe's mission while also potentially benefiting from tax advantages. Planned gifts reflect a deep and enduring dedication to the cause we champion.

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### **Benefits of Planned Donation**

#### **1. Long-Term Impact**

Planned gifts provide sustained support to the Fondation Jean Lapointe, ensuring that your generosity continues to benefit future generations.

#### **2. Tax Advantages**

Depending on current legislation, planned gifts may offer advantageous tax benefits, either during your lifetime or upon the transfer of your estate.

#### **3. Flexibility and Choice**

Planned gifts can take a variety of forms, allowing you to choose the approach that best aligns with your financial situation and philanthropic goals.

#### **4. Personal Legacy**

By making a planned gift, you create a lasting legacy that will benefit future generations and demonstrate a strong commitment to causes you value deeply.

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### **Types of Planned Donations**

Several planned giving options are available to accommodate a range of needs and objectives. These include:

#### **1. Bequests through a Will**

One of the most common forms of planned giving, a bequest involves designating a portion of one's estate to the Fondation Jean Lapointe through a will. This may include:

- A percentage of the total estate
- A specific asset (real estate, valuables, etc.)
- A fixed sum of money
- Registered retirement funds (RRSPs or RRIFs)

#### **2. Life Insurance Policies**

You may decide to name the Fondation Jean Lapointe as the beneficiary of a life insurance policy, enabling a substantial future gift while retaining control of your assets during your lifetime. Premiums may be tax-deductible under certain conditions.

#### **3. Charitable Trusts**

Through a charitable trust, you may transfer assets to the Fondation Jean Lapointe while continuing to receive income from those assets for a defined period. Upon termination of the trust, the remaining assets are transferred to the Fondation in accordance with your instructions.

#### **4. Gifts of Securities**

Donations of publicly traded securities such as stocks, bonds, or mutual funds may be transferred directly to the Fondation Jean Lapointe. This approach may significantly reduce capital gains taxes and enhance the overall value of the gift.

## 5. Real Estate Donations

Real property—whether a primary residence, secondary home, or land—may also be donated to the Fondation Jean Lapointe. Such gifts can generate meaningful philanthropic impact while offering potential tax benefits.

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## How to Establish a Planned Donation?

### 1. Define Your Objectives

Consider how you wish to support the Fondation Jean Lapointe and the type of legacy you wish to create. Evaluate the potential financial and fiscal benefits of your planned gift.

### 2. Seek Professional Advice

It is advisable to consult with a legal or financial advisor to ensure that your planned gift is structured optimally, in accordance with your intentions and applicable laws.

### 3. Notify the Jean Lapointe Foundation

Should you decide to proceed with a planned gift, we encourage you to inform the Fondation Jean Lapointe. Our team will be pleased to guide you through the available options and ensure your intentions are honoured.

### 4. Formalize Your Gift

If you are making a bequest, be sure to update your will accordingly. Proper documentation ensures that your philanthropic commitment will be fulfilled as intended.

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## Donor Testimonials

### **Marie, donor for over 10 years**

“Planned giving has allowed me to contribute meaningfully to the future while benefiting from tax advantages. It is a thoughtful and human gesture that aligns with my values.”

### **Roger, former resident of the Maison Jean Lapointe**

“I take pride in leaving a legacy to the Fondation. Through my planned gift, I have ensured the continuity of the important initiatives they build and their long-term impact.”

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## Contact Us

For further information regarding planned giving or to discuss how you can contribute to the Fondation Jean Lapointe's mission, please do not hesitate to contact us. We would be pleased to accompany you in this generous and impactful process.

**We are sincerely thanking you for your support!**