



Fondation
Jean Lapointe

Towards a sober future

SUPPORT THE FIGHT
AGAINST ADDICTION
WITH A **PLANNED GIFT**



WHAT IS THE PURPOSE OF A PLANNED GIFT?

Regardless of your income and your age, planned giving allows you to make a significant charitable gift that will support our mission in the fight against addiction, and benefit from tax savings in your financial and estate planning.

It is an opportunity to make a philanthropic gesture which consists of planning a long-term donation in favor of a cause that is dear to you. Whether **immediate or future**, planned giving considers your personal, family and fiscal circumstances.

By choosing the Fondation Jean Lapointe in your legacy, you inspire those around you and leave a positive trace of your values.



Types of gifts

**WILL AND
LEGACY**

**LIFE
INSURANCE**

**PUBLIC
SECURITIES**

**REGISTERED
FUNDS**

THE BENEFITS OF PLANNED GIVING

A planned gift to the Fondation Jean Lapointe allows you to extend your philanthropic commitment based on your values.

This is your opportunity to make a meaningful contribution to the mission of Maison Jean Lapointe: improve the quality of life of people through treatment, prevention, support, and sharing of knowledge regarding substances and addictions.

Lasting Impact

Through a planned gift, you offer long-term support to the Fondation Jean Lapointe. Your gesture will continue to positively influence our work long after your passing.

Tax Savings

Under the current legislation, planned giving may qualify for significant tax deductions, whether during your lifetime or when distributing your estate to your heirs.

Social Responsibility

In operation throughout the province since 1982, Maison Jean Lapointe is a credible and responsible organization, whose actions have a direct impact on our society.

Personal Legacy

A planned gift allows you to leave a tangible legacy, according to your wishes and personal values, which provides essential support to people in need.



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.

– Marie, donor since 2015





JEAN LAPOINTE

He made us laugh, he moved us to tears and made us ponder more than once. His story and his fight against alcohol addiction have touched our hearts. He was a role model and inspiration to those trying to fight and overcome their addictions. He was our quiet strength, the one that brought us together and united us in this important struggle.

**Passed away in 2022,
Jean Lapointe remains very
much alive thanks to his legacy.**





WILL AND LEGACY

The most common form of legacy giving is a gift in your will. By planning in your will your wish to bequeath a sum of money, tangible or intangible assets, or any other asset to the Fondation Jean Lapointe, you ensure that your contribution is fulfilled after your passing.

TYPES OF WILLS

- Specific bequest (a fixed amount or a specific asset)
- Residual bequest (all or a percentage of the remainder of a donor's estate after payment of debts)
- Universal bequest (tangible and intangible assets, divided amongst beneficiaries)

WORDING EXAMPLE

"I bequeath the sum of \$__ (or __% of the remainder of my estate) to the Fondation Jean Lapointe (charitable number 891725442RR001)."

GETTING STARTED

- Discuss your estate planning with a financial advisor.
- Consult a notary and formalize the gift in your will, which can be revised as you wish.
- Inform our Foundation of your intention to leave a legacy so we may acknowledge your generosity during your lifetime.

REGISTERED FUNDS

A gift of an RRSP (Registered Retirement Savings Plan) or RRIF (Registered Retirement Income Fund) allows you to bequeath all or part of your retirement savings. This type of gift can provide significant tax benefits for the estate.

GETTING STARTED

- Discuss your estate planning with a financial advisor.
- Consult a notary to designate the Fondation Jean Lapointe as beneficiary in your will.
- Inform our Foundation of your intention to donate so we may acknowledge your generosity during your lifetime.



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.

**– Roger, former resident of
Maison Jean Lapointe**

PUBLIC SECURITIES

If you own stocks, bonds, mutual funds or stock options, shares or purchase options, you can transfer them directly to the Fondation Jean Lapointe. This helps reduce capital gains taxes and maximize your contribution.

GETTING STARTED

- Consult with a financial advisor to confirm which title will be donated and your tax benefits.
- Download the securities donation form on the Fondation Jean Lapointe's website.
- Complete the form and send a copy to your broker or investment institution.
- Send a copy of the form to the Fondation Jean Lapointe's broker, as well as our Planned Giving Advisor (as indicated on the form).
- The Fondation Jean Lapointe will prepare a tax receipt equal to the market value of the share at the time of the donation.

LIFE INSURANCE

You can designate the Fondation Jean Lapointe as the beneficiary of a life insurance policy. This allows you to make a substantial gift while maintaining control over your finances during your lifetime.

TYPES OF DESIGNATION

- You remain the owner of the life insurance policy.
- You transfer an existing life insurance policy.
- The Fondation Jean Lapointe becomes the owner of the life insurance policy.

GETTING STARTED

- Discuss your intention with a financial advisor regarding the tax advantages for your estate.
- Contact your insurer to add the Fondation Jean Lapointe as a beneficiary of your life insurance policy.
- Inform our Foundation of your intention to leave a legacy so we may acknowledge your generosity during your lifetime.



*Your
impact*

**YOUTH
PREVENTION
PROGRAMS**

**ADDICTION
TREATMENTS**

**SUPPORT FOR
FAMILIES AND
LOVED ONES**

**RECOVERY
SUPPORT**



THE COMMITMENT CIRCLE

When choosing to make a planned gift, you become a member of our **Commitment Circle** which highlights the contribution of all people who have designated the Fondation Jean Lapointe in their estate planning. This is our sincere testimony of gratitude to your philanthropic gesture.

Our thanks for your generosity

We will suggest highlighting your commitment in a communication, for example in a newsletter, in the list of donors on the foundation's website and in our annual report. For estates of \$25,000 and more, we offer to participate in a personalized tour of Maison Jean Lapointe and to write your name on a wall of recognition.

Anonymity requests

Should you prefer to remain anonymous, the Foundation is committed to honor your wishes. Therefore, no information will be revealed in the Foundation's public communications. Other private acknowledgement will be maintained, such as calls, thank you letters and exclusive invitations.

PREPARE YOUR PHILANTHROPIC LEGACY

Set your goals

Consider how you wish to support the Fondation Jean Lapointe.
Evaluate the long-term potential financial and fiscal benefits
of your planned gift.

Consult an expert

Our Foundation will not provide financial, tax or legal advice,
but will encourage you to consult a professional
according to your philanthropic goals.

Notify the 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.

Contact us

Mélanie Bisson

Senior Advisor, Major and Planned Gifts
514 288-2630 ext. 303

melanie.bisson@fondationjeanlapointe.org
www.fondationjeanlapointe.org/en/planned-giving



**Fondation
Jean Lapointe**