

What is Planned Giving?

What we leave after we are gone can have a big impact on our friends and loved ones, and the community that we cherish.

United Way Simcoe Muskoka is privileged to work with you in helping you leave behind a legacy of change and positive impact through our planned giving options.

Your legacy is something we take very seriously, and we are here to help you with respect and consideration.

"A COMMUNITY
GROWS GREAT WHEN
WE PLANT TREES
WHOSE SHADE WE
KNOW WE WILL NEVER
SIT IN."

- Greek proverb

We Are Here to Help

Do you have any questions about planned giving and your legacy? Or are you ready to make a lasting impact on your community and those who need it most?

United Way Simcoe Muskoka is here to help you, no matter what your questions or needs.

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What Legacy Will You Leave?

Planned Giving



The Advantages of Planned Giving

There are many advantages to planning your legacy. While different gifts can have different benefits, working with United Way Simcoe Muskoka's planned giving specialist can:

Leave a bigger gift than you might be able to during your lifetime.

Receive a charitable tax receipt to offset estate taxes for your family.

Satisfaction of a future gift while retaining control of your assets.

Reduce probate fees or avoid tax on capital gains, depending on your type of gift.

Leave behind a legacy that you and your family can be proud of.

Help the most vulnerable in Simcoe Muskoka reach their fullest potential.



Planned Giving Options

Gifts of Securities

A cost-effective opportunity to transform an asset into immediate and significant support, while eliminating costs of capital gains and amplifying the impact of your gift.

A Gift in Your Will

The generous and surprisingly simple act of including United Way Simcoe Muskoka in your will is a powerful way of ensuring a legacy of compassion. Allowing you to still retain control of your assets, a gift in your will can enable you to make a bigger gift in the future than you might currently be able to.

Gifts of Life Insurance

An impactful alternative to cash, gifts of life insurance transform modest payments into a significant gift while reducing taxes and leaving more to your family and loved ones.

RRSPs, RRIFs and TFSAs

A gift of retirement fund assets is a tax-smart and effective way to turn those funds into meaningful support for the most vulnerable in your community. Making a gift of retirement assets also helps to avoid unnecessary estate taxes for your family to pay.