



ALUMNI AFFAIRS & DEVELOPMENT

Frequently Asked Questions

Why give through your estate?

A gift in the form of a bequest, insurance, or annuity allows you to make a significant gift from your estate rather than your current income. Your gift provides a meaningful benefit to the University, while creating tax benefits for you or your heirs.

You can also establish an endowment through an estate gift to provide long-term support for the University. The endowment could be named according to your wishes to provide enduring recognition for your estate gift.

Isn't it better to help now and not later?

We most certainly need help today and are grateful to those who give gifts in their lifetime. Many people find that they can make a larger gift through their estate plans than otherwise would be possible during their lifetime.

Later in life, many people have equity tied up in their home or want to make sure that there is enough money available for unforeseen circumstances such as the need for long-term care. By leaving a percentage of your total estate to a charity, you continue to protect your assets during your lifetime.

Doesn't the government fund education?

While government funding is important, it does not cover everything. Gifts in estate plans have enabled the University of Guelph to recruit and retain world-class faculty and researchers, develop infrastructure, and support scholarships to lessen the financial burden for those brightest students and/or those in financial need.

What about my loved ones?

Many people find that they have enough in their estate to care for family members and allocate a share of their estate to causes that are most important to them.

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IMPROVE LIFE.

Can I direct my estate gift?

You can direct your estate gift to support a particular area that is close to your heart, or to the University's highest priority. We would be happy to work with you to determine a direction for your estate gift that is most meaningful for you.

What if I want to help more than one charity?

You may hold several causes close to your heart and you might want to remember more than one of them in your estate plans. This is entirely possible.

What if I want to change my estate plans?

We understand that your situation could change. You can modify a gift in your will at any time. Your will always stays in your control. It is important, however, to keep your will up-to-date so that it best reflects your wishes. This may provide you with peace of mind that everyone and everything you care about will be looked after.

What do I do now if I do want to make a gift through my estate?

We recommend that you talk with your lawyer about the best way to make sure that you will reflect your wishes.

What is the J.D. MacLachlan Society?

The J.D. MacLachlan Society recognizes friends and alumni who have confirmed a gift to support the University in the future through a bequest, a gift of insurance, annuity or other means.

The J.D. MacLachlan Society is named in honour of the first president of the University of Guelph. An outstanding teacher and research scientist, Dr. MacLachlan was a visionary who played a central role in the creation of the University in 1964. The J. D. MacLachlan Society honours his legacy, and recognizes the leadership of people who demonstrate their commitment to the future of the University of Guelph through a gift in their estate.

What are the benefits of the J.D. MacLachlan Society?

As a member of the J.D. MacLachlan Society, you will receive invitations to a number of annual events at the University, including the President's Open House. You will also receive University publications such as *Portico* and the *President's Report*.

Where can I get more information?

For more information, please email bequests@uoguelph.ca or call 519-824-4120 ext. 56196.