Send for Your Free, New Booklet

Going to the trouble of having a will is a part of being mature. There are still people, of course, who won’t make a will for the sole reason that “after I’m gone, I don’t care what happens.” Because you care, however, a will figures prominently in your plans for the future. Your will allows you to minimize estate losses from death taxes and other costs that can rob your family of precious assets. It lets you nominate guardians or trustees to shelter and protect family members. And it enables you to direct, in a very personal way, how your property will be distributed. Your will, in effect, gives you the opportunity to improve the quality of life for your family for several generations.

There is one more thing you can accomplish with your will: You can make a bequest to Queen’s University at Kingston. Your bequest will ensure continued quality education at the university.

Queen’s University* hopes this newsletter will help you in your will planning. We also invite you to send for our comprehensive publication – Successful Wills, Successful Lives.

*Residents of the United States

U.S.-based alumni and relatives can make donations including bequests directly to the University via the Canada-United States Income Tax Convention. Matching gifts, gifts from other American citizens or residents, or gifts from corporations, foundations, trusts and IRA accounts should be directed to the U.S. Foundation for Queen’s University at Kingston (Employer ID 52-1960422). Our U.S. Foundation is a 501(c)(3) tax-exempt organization recognized under the U.S. Internal Revenue Code.

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The Royal Legacy Society recognizes those alumni and friends who have thoughtfully remembered Queen’s University through a bequest or another future gift commitment.

If you have already remembered Queen’s with a future gift, please let us know so that we can honour your intention.

For more information on the Royal Legacy Society please visit our website at queensu.ca/alumni/rls.

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Putting the Queen’s Endowment to Work for Your Legacy

The Ewans chose to make their gift using a spend-down fund because it enables them to make a significant impact over a relatively long time frame. Queen’s newest fund option, the spend-down model is invested in the Queen’s endowment, so it generates investment returns in addition to the original gift’s face value. The fund pays out 10 percent of the gift’s face value each year until it spends down, which is how the Ewans’ gift is able to generate $10,000 a year.

The payments, which include the investment returns, typically last about 10 to 20 years, although they could last longer (or shorter) depending on the investments.

One of the reasons spend-down funds can pay out so much is that, unlike endowed funds, they are not designed to last in perpetuity. That enables them to make a significant impact over a relatively long time frame.

The Ewans have made their gift commitments a reflection of their lives at Queen’s. If you are considering making your own gift to Queen’s, we encourage you to think about a meaningful reflection of your own life, please get in touch with our Gift Planning team. We can help you develop the best way for you to create your legacy.