

## Continue your impact with Planned Giving

CMHA's loyal donors know how important it is that we continue to speak up for equal access to the best possible mental health. When generous donors include CMHA in their will, their bequests – whether modest or major – help provide sustainable, ongoing funding for that strong, independent advocacy.

Whether you want to target support to a particular area or help secure the foundation for our independent voice, there is simple language below you can use to draft or update your will.

There are a few different ways people can plan to support a charity after they pass away – bequests, gifts of securities, real estate and property or as a designated beneficiary. The most common planned gift we receive is a gift given as a bequest through the donor's will.

### Ensuring your wishes are clear

To make sure your intentions are clear it is recommended to include the organization's legal name, address and charitable registration number.

**Legal Name of Charity:** Canadian Mental Health Association, B.C. Division  
**Address:** 905-1130 West Pender Street  
Vancouver, BC V6E 4A4  
**Charitable Registration No.** 88844 1995 RR 0001

We encourage you to connect with us so we make sure your wishes can be fulfilled. We would also love to recognize your support and keep you informed about our work. Or, if you prefer anonymity that will also be respected. Please contact Maya Russell at [maya.russell@cmha.bc.ca](mailto:maya.russell@cmha.bc.ca) or 604-351-2653, or Jocelyn de Montmorency at [jocelyn.demontmorency@cmha.bc.ca](mailto:jocelyn.demontmorency@cmha.bc.ca) or 250-514-2717.

### Types of bequests and sample language

When adding a bequest to your will, there are three types of gift for you to consider.

- Specific Gift: a specific amount of money or other asset
- Residual Gift: percentage of an estate after debts, taxes, expenses and any specific gifts are paid
- Contingency Gift: takes effect only if a person is not survived by other individuals

Below is some sample language you can use or adjust. Please get independent legal advice as well.

**Specific Amount, General Purposes** "I give to the Canadian Mental Health Association, B.C. Division *the sum of \$...(or percentage of my estate)* to be used for the general purposes of the Canadian Mental Health Association, B.C. Division at the discretion of the Board of Directors."

**Percentage of Estate, General Purposes** “I give to the Canadian Mental Health Association, B.C. Division (*stated % percentage*) of the rest, residue, and remainder of my estate for the general purposes of the Canadian Mental Health Association, B.C. Division at the discretion of the Board of Directors.”

**Contingent Bequest, General Purposes** “If (*name of primary beneficiaries*) do/es not survive me, or shall die within ninety days from the date of my death, or as a result of a common disaster, then I give to the Canadian Mental Health Association, B.C. Division (*description of cash, property, or percentage or residual estate*) for the general purposes of the Canadian Mental Health Association, B.C. Division at the discretion of the Board of Directors.”

**Specific Amount for Specific Purposes** “I give to the Canadian Mental Health Association B.C. Division the sum of \$\_\_\_\_\_ *in cash or in-kind (details)* to be used for \_\_\_\_\_ at CMHA BC Division.

If changed circumstances should at some future time make it impractical to continue using the income from the Fund for the purpose designated, then the CMHA BC Division Board of Directors may re-designate the purpose to adhere as closely as possible to my original intent. “

**Percentage of Estate to create an Endowment Fund** “I give to CMHA BC Division \_\_\_ percent (%) of the rest, residue, and remainder of my estate to establish the \_\_\_\_\_ ENDOWED FUND. The principal of this fund shall be invested as part of CMHA BC Division's permanent endowment and in accordance with its policies. The income there from is to be used by CMHA BC Division. Contributions may be added to the fund at any time.

## Frequently Asked Questions

### How will my gift be used?

Unrestricted gifts allow CMHA to address critical needs that are not funded, and to do independent advocacy and policy work. For any bequest over \$10,000, CMHA policy requires that 25% be protected in CMHA’s restricted endowment fund, which means that portion is protected and only the interest is paid out to the charity every year.

### Can CMHA issue a tax receipt to the estate?

Yes, a donor’s estate is eligible for a tax receipt for the gift’s full value when the gift is received. This can be applied to a donor’s final tax return.

### Do you have to be wealthy to make a bequest?

Some of our bequests are from loyal donors of very modest means! Often people accumulate more assets than they realize, and can provide for loved ones and also make a charitable gift in their will.

### Can I direct my gift to a particular area of need?

Bequests given to “the area of greatest need” are helpful because there is flexibility to use the funds to respond to shifting pressures over time. For some donors it is important to fund a particular area of need and these are also deeply appreciated.

If you want to direct a bequest to a specific purpose please confirm with us to make sure we can fulfill your intentions. One option is to help us grow our existing endowment funds. These are held and managed by the Vancouver Foundation on behalf of CMHA, and the dividends are paid out to support our work.



**The above information does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice. CMHA BC Division encourages you to seek professional advice as you plan your estate.**

Questions? Please contact Maya Russell at [maya.russell@cmha.bc.ca](mailto:maya.russell@cmha.bc.ca) or 604-351-2653, or Jocelyn de Montmorency at [jocelyn.demontmorency@cmha.bc.ca](mailto:jocelyn.demontmorency@cmha.bc.ca) or 250-514-2717.