

## Why make a Legacy Gift to the University of Victoria?



Would you like to make a lasting impact on future generations of UVic students and, through them, on the world? Do you have the means to fulfill that vision? Perhaps you don't today, but with careful planning you can create a legacy gift that makes a much larger contribution than you may think possible.

### What is a Legacy Gift?

A legacy gift, also called a "planned gift", is a charitable donation that can be set up during your lifetime but won't become available to the University of Victoria until sometime in the future. While the most common type is a gift through your Will, future gifts can come in many forms and some of them can provide tax benefits now.

### How to make a Legacy Gift to UVic

If this type of gift interests you, staff in the UVic Planned Giving office can discuss your options. Our goal is to ensure your legacy is managed and administered according to your wishes. We can work closely with you and your advisors to capture the true spirit and intent of your gift.

See contact information on back panel.

## GIVE ONE EDUCATED GIFT TODAY.

*Impact countless tomorrows.*



University of Victoria



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For more information contact:

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**[www.uvic.ca/givingtovic/ways/legacy/](http://www.uvic.ca/givingtovic/ways/legacy/)**

All enquiries are kept strictly confidential. Please consult your income tax, financial, and/or legal advisors before arranging a legacy gift.



## First Love Becomes UVic Legacy



Passionate about the value of public health nursing, James and Phillippa Kerr wanted to help future UVic students serve their communities with advanced clinical care.

The Kerrs' lifelong commitment to public health began when they worked as nurses in First Nations communities across Canada, and continued throughout their careers in other health-related fields.

After Jim's death, Phillippa established the James and Phillippa Kerr Scholarships at the University of Victoria.

When she died in April 2013, Phillippa left a generous gift to sustain the Kerr Scholarships forever and to motivate students like Julie Moore.

Julie, a psychiatric nurse, could have been working extra hospital shifts to pay for her Master's degree at UVic. Instead, thanks to receiving the James & Phillippa Kerr Scholarship in the School of Public Health and Social Policy, she was able to focus more time and effort on her studies.



Although James and Phillippa never met Julie, they touched her life in a profound way. Julie calls the scholarship "a true gift".

## What are your options?

While a charitable bequest in your Will may be your most realistic legacy, there are other options that may be better suited to your philanthropic goals, tax plans, and financial needs.

The possibilities include:

### BEQUEST

You can make the University of Victoria a beneficiary in your Will. Gifts can be an absolute dollar amount, a specific asset, or a percentage or residue of your estate.

### LIFE INSURANCE

You can designate UVic as an owner and/or beneficiary, in whole or in part, of an insurance policy. This can be applied to an existing policy, or to one that is newly purchased.

### RETIREMENT PLAN ASSETS

You can make the university a beneficiary of a qualified retirement plan.

### GIFT OF RESIDUAL INTEREST

You can give personal property, such as an art collection or real estate, to UVic now and continue to enjoy the use of the property for life.

### CHARITABLE REMAINDER TRUST

You can transfer assets to a trust that generates investment income. The income is paid to you and/or another named beneficiary or beneficiaries. The University of Victoria receives the remaining capital upon your death or that of the named beneficiary(ies).

## Thank you for Your Commitment

When you tell us of your intention to leave a legacy gift to the University of Victoria, you automatically qualify for inclusion in the T. S. McPherson Legacy Society. As a member of the Society, you will be invited to an annual appreciation event where you will meet likeminded people who are as committed to the University of Victoria as you are. You will also be kept up-to-date on key successes at UVic.



In 1961, the citizens of Victoria started raising funds for a university. Their efforts were given a huge boost by the legacy of Thomas Shanks McPherson. He passed away in 1962 and his bequest built the core of the campus we know today. Many of the university's founders readily acknowledged that the University of Victoria might not exist at all if it wasn't for Thomas McPherson.

T.S. McPherson felt strongly that the growth and development of a university in Victoria was, in his words, 'the single most important factor in the progress of the city'.

Just as T.S. McPherson inspired the university's founders, hundreds of donors like you continue to inspire us with your legacy gifts. Your life experiences vary, but you all share the common belief that UVic students deserve support now and for generations to come.

*Membership in the T.S. McPherson Legacy Society is kept strictly confidential, as is any other information regarding our members and their bequests or other legacy gifts.*