

YOUR OPTIONS FOR PLANNING A GIFT TO MUSCULAR DYSTROPHY CANADA

"I knew finding a cure would have to be a long-term goal, which we'd have to be patient... I also knew a cure wasn't going to happen in my son's lifetime, maybe not even in my own. But I knew it would help future generations. In fact, the research the organization has supported over the years is already beginning to pay dividends. And that makes me very happy."

-Dr. David Green, Muscular Dystrophy Canada founder

Autumn, 1954: the setting is a kitchen table in Toronto. A group of parents sit together discussing their children's needs and futures. Their children have Duchenne muscular dystrophy, a neuromuscular disorder. These parents decide to make the greatest initial investment: they launch Muscular Dystrophy Canada to fund scientific research in order that one day, treatments and cures for neuromuscular disorders might be found, and – until that time – to provide services, care, and support.

Today, the staff and volunteers of Muscular Dystrophy Canada still meet around kitchen tables on occasion, but they also meet around laboratory tables, picnic tables, and virtual tables on the Internet. Muscular Dystrophy Canada funds research across the country: progress has been made in treating the symptoms of some neuromuscular disorders, although no cures have yet been found. Over ten thousand Canadians with neuromuscular disorders reach out to Muscular Dystrophy Canada for assistance, whether it is for equipment (wheelchairs, walkers, splints) or for a reassuring voice.

Planning a gift to Muscular Dystrophy Canada is a lasting commitment; it represents your continuing investment in hope and the future for all those with neuromuscular disorders.

WHAT IS A PLANNED GIFT?

A **planned gift** is a gift made with deliberation: it takes into consideration the benefit to your financial situation

and estate, as well as the benefits to the charity. It could be a gift left to Muscular Dystrophy Canada in a will, or you could make Muscular Dystrophy Canada a beneficiary of a life insurance policy. It could be a gift of art or real estate, a gift of stocks, bonds, or mutual funds, or a gift to a specific fund named after yourself or someone you wish to honour.

Planned gifts often have other advantages, such as a greater tax benefit to you. They often allow you to give a larger or more meaningful gift than if you contribute funds readily at hand.

WAYS OF MAKING A PLANNED GIFT

Bequest

One of the most popular ways of making a planned gift is a bequest: a gift left in a will to Muscular Dystrophy Canada. You could add Muscular Dystrophy Canada to your will, or amend your existing will. You can bequeath a portion of your estate, or a gift of securities or other property (see below). Please contact us for more information on making a gift in your will – we can provide a comprehensive guide for you.

Insurance

You can revise an existing life insurance policy to make Muscular Dystrophy Canada a beneficiary, or take out a new policy. By paying relatively small premiums now, your policy will make a large gift to Muscular Dystrophy Canada later.

Gifts of Securities & Property

Stocks and bonds (including mutual funds) may be transferred to the organization without first being converted to cash. For highly appreciated securities, generous tax advantages make this a wiser choice than cash. Or perhaps you have some artwork or real estate: Muscular Dystrophy Canada can discuss the options available to you to make these into valued gifts.

Charitable Trusts & Gift Annuities

Charitable trusts allow you to make a gift of investments, while retaining the income from them for your use. Gift

Annuities allow you to transfer a gift to the charity now, and receive payments out of the gift as personal income.

OPPORTUNITIES TO INCREASE THE BENEFIT OF YOUR GIFT

Named & Endowed Funds

Muscular Dystrophy Canada allows you to name a fund after yourself or someone you wish to honour. These funds are often directed to specific purposes that you designate. An endowed fund is a wise choice because it provides far into the future, as the income from the fund is used to benefit our charitable activities: an endowment is a way of ensuring the sustainability of programs and resources. Named and endowed funds require a minimum gift or pledge amount of \$20,000.

Purpose of Gift or Fund

Most gifts and funds are usually applied towards the area of greatest need. Alternatively, you may wish to direct your gift or fund to be used in a specific area – such as research or services for persons with neuromuscular disorders. Both taxation laws and Muscular Dystrophy Canada policies restrict the extent to which a gift can be directed, so please contact us before proceeding.

THE 1954 SOCIETY

In tribute to the founders of Muscular Dystrophy Canada, *The 1954 Society* recognizes those individuals who have made – or have pledged (such as in a will) – a planned gift to Muscular Dystrophy Canada. As well as special recognition in our Annual Report, members of *The 1954 Society* enjoy other benefits and recognition for their commitment to Muscular Dystrophy Canada and the fight against neuromuscular disorders.

Alternatively, you may wish to make your gift anonymously. We will take great care to honour your wishes.

“I feel grateful today for my past with the Muscular Dystrophy Canada; that it has been part of my life to be able to contribute something to muscular dystrophy. I think the greatest joy I have today is meeting a person who tells me – ‘Years ago you were the first person who contacted me after we had our diagnosis of muscular dystrophy, and I feel very close to you.’”

- Mary Ann Wickham, Services program founder

For more information

We hope that this document provides you with enough information to allow you to consider making a planned

gift. If you require further information, please contact our national Development & Planned Giving office. Someone will be pleased to speak with you about all the ways of planning a gift to Muscular Dystrophy Canada. Contact us today!

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The information provided in this document is not intended as legal advice or personalized financial planning. Muscular Dystrophy Canada cannot provide complete financial or legal opinions. We strongly encourage you to consult your family and obtain independent professional advice.

This “Info Muscular Dystrophy Canada” form was updated on October 24, 2007.



Muscular Dystrophy Canada is a participant in the *Leave A Legacy™* program in most local communities.

Muscular Dystrophy Canada is a member of the Canadian Centre for Philanthropy, and we abide by our Statement on Accountability.

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