



A guide to preparing **YOUR WILL**

A thoughtful guide to help you think about your estate, prepare information and make decisions that will bring you peace of mind.

Let your love of animals live forever. Leave a lasting legacy for the Ontario SPCA and Humane Society.



Leave a lasting **LEGACY**

What is a legacy gift?

Making a legacy gift can be as simple as leaving a direction in your will that instructs your executor/trustee to donate one or more of your assets to a charitable organization. It's an easy way to help support animals while achieving significant tax savings.

Why is it so important to prepare a will?

Your will is the foundation of your estate plan. It makes clear your wishes for distributing your assets. It names an executor to administer your estate and may specify a trustee for managing assets on behalf of the people you name as beneficiaries of money, investments or property.

Your will makes it much easier for your family and friends to receive money and valuable possessions you leave behind in your estate. Without a will, provincial laws determine who receives what. If you do not have relatives, it is likely the provincial government will receive your estate, instead of the friends or organizations you wish to benefit.

What are the different bequest options?

A carefully prepared will can ensure all reasonable provisions have been made for your dependents. Your will can be an effective way to make a charitable gift to an organization you respect. A will also helps minimize taxes at the time of death. Bequests can be in the form of cash, securities, real estate, tangible personal property or other assets.

Residuary Bequest

The Ontario SPCA and Humane Society would receive a percentage of all of the remainder of your estate after other specific bequests have been paid out. The actual value would be sensitive to any change in the value of your estate between the date you make your will and the date of your death.

Specific Bequest

Your bequest can be for a specific amount, a percentage of your estate, or for all or a portion of what is left after you have made gifts to your family and loved ones.

Sample wording

Here is some suggested wording to provide for a charity, such as the Ontario SPCA and Humane Society, in your will. Similar wording would be used to designate others you would like to provide for in your will.

Unrestricted Bequests

I give to the Ontario SPCA and Humane Society all or _____% of the residue of my estate for use as the Ontario SPCA and Humane Society may deem appropriate.

I give to the Ontario SPCA and Humane Society \$_____or _____% of my estate for use as the Ontario SPCA and Humane Society may deem appropriate.

Restricted Bequests

I give to the Ontario SPCA and Humane Society \$_____or _____% of the entire residue of my estate to be used for the following:

Are there any tools **TO HELP ME WRITE MY WILL?**

We've included some worksheets on the following pages to help you prepare information for your will. Use the worksheet to list all the people you wish to provide for, and include their birth date (for children), complete address, and relationship to you. Remember to list charitable organizations you wish to remember.



What personal information is needed?

Date this information was prepared: _____

Name: _____

Street: _____ City: _____

Province: _____ Postal Code: _____

Home Phone: _____ Work Phone: _____

Birth Date: _____ Place of Birth: _____

Date of previous will: _____ Location: _____

Who has access to your previous will: _____

Marital Status: _____ Place of Marriage: _____

Is there a marriage contract or pre-nuptial agreement? Yes No

Name of Spouse: _____

Street: _____ City: _____

Province: _____ Postal Code: _____

Home Phone: _____ Work Phone: _____

Birth Date: _____ Place of Birth: _____

Previous Marriages(s): _____

Names, addresses and ages of living children:

Names, addresses of other persons to be named in the will:

Names and addresses of charitable organizations to be named in the will:

What about executors and alternate executors?

Your choices of executor and alternate executor are important. Your executor should be a mature person capable of conducting business affairs. Your spouse, a relative or a friend could be possible choices. Because an executor could pre-decease you or be unable to serve, it's wise to choose an alternate. Trust companies also act as executors, for a fee, and will always be able to serve.

Executor's Name: _____

Contact Information: _____

Alternate Executor's Name: _____

Contact Information: _____

What about a guardian for underage children?

Guardian's Name: _____

Contact Information: _____

What about a guardian for my pets?

Guardian's Name: _____

Contact Information: _____

Pet Particulars:

Pet Name	Animal Type	Description of Pet	Date of Birth
i.e. Henry	Cat	Neutered male, domestic short hair, brown tabby	July 22, 2014

What about professional advisors?

Several people may maintain records important to settling your estate. Many law firms have facilities for storing original wills, and your accountant may have tax records.

Accountant

Contact Information: _____

Lawyer

Contact Information: _____

Financial Institution (Bank, Credit Union, Trust Company)

Contact Information: _____

Financial Planner/Advisor

Contact Information: _____

Insurance Agent

Contact Information: _____

What about the location of important records?

My tax records are stored at: _____

My safety deposit box is at: _____

Location of my safety deposit key: _____

My original birth certificate is stored: _____

My company retirement and pension papers are stored: _____

My military records and pension papers are stored: _____

Details of my funeral arrangements/wishes are as follows: _____

Funeral arrangements have been made: Yes No

Name of funeral home: _____

My wishes are: _____

Your will does not need to describe precisely how you want every item of your estate distributed. However, if there is someone to whom you wish to give a specific item or sum of money, or if there has been a change in your wishes that you outlined in a previous will, explain below.

Person or Organization	% of Residue of My Estate

How should I organize my assets?

Making a list of your assets and your current liabilities makes it easier to divide your estate, and helps your lawyer guide the preparation of an actual will.

Assets	\$
Principal Residence:	
Other Real Estate:	
Investments:	
• RRSP's	
• RRIF's	
• RPP's	
• Stocks	
• Bonds	
Life Insurance:	
Pension Benefits:	
Bank Accounts:	
Trust Company Accounts:	
Business Interests:	
Jewellery:	
Automobiles:	
Art:	
Valuable Furnishings:	
Other:	
Total Assets:	\$

Liabilities	\$
Mortgage:	
Second Mortgage:	
Credit Cards:	
• Visa	
• MasterCard	
• American Express	
• Other	
Bank Loan:	
Personal Loan:	
Business Loan:	
Car Loan:	
Car Lease:	
Other:	
Total Liabilities:	\$



Let your love for animals
LIVE FOREVER

The Ontario SPCA and Humane Society is a registered charity, established in 1873. The Society and its network of communities facilitate and provide for province-wide leadership on matters relating to the prevention of cruelty to animals and the promotion of animal well-being. Offering a variety of mission-based programs, including community-based sheltering, animal wellness services, provincial animal transfers, shelter health & wellness, high-volume spay/neuter services, animal rescue, animal advocacy, Indigenous partnership programs and humane education, the Ontario SPCA is Ontario's animal charity.

Working together we can make a difference in the lives of countless animals in need.

Whether you are writing a will or amending an existing one, we suggest consulting a lawyer and your financial planner.

If you have not yet prepared a will, we recommend you do so. This is an important first step to ensure your intentions for your estate are properly documented and that your family and loved ones will be taken care of after you are gone. **A gift in your will is a way to make a lasting difference for the animals that are close to your heart.**

If you have additional questions that have not been answered in this guide to preparing your will, please contact:

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**ONTARIO
SPCA**
AND HUMANE SOCIETY



Ontario SPCA and Humane Society

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The information provided in this guide is general in nature and not a substitute for independent legal or financial planning advice. It is the policy of the Ontario SPCA to encourage our supporters to seek independent counsel before making a legacy gift.