

Leave a Legacy WITH

CMS

Planned Giving

- Gifts of Cash
- Gifts of Residual Interest
- Gifts of Retirement Plans
- Charitable Gift Annuities
- Donor Advised Funds
- Gifts of Life Insurance
- Gifts of Stocks and Securities
- Gifts to the Endowment Fund
- Gifts in Kind
- Will Bequests
- Charitable Remainder Trusts

You can create major and planned gifts in many ways:

Gifts of Cash

Allows your gift to be put to work immediately. You will receive a tax creditable receipt for the full amount of your gift. This provides an immediate tax-saving and reduces the cost of your gift by 40-50% depending on your current tax rate and where you live in Canada.

Gifts of Residual Interest

If property, such as real estate or a favorite painting is deeded to the CMS you retain the right to use and enjoy it during your lifetime.

Gifts of Retirement Plans

Transform tax liabilities into a charitable gift by simply naming the CMS as the beneficiary of your RRSP or RRIF. Similar treatment is afforded to a Registered Pension Plan (RPP).

Charitable Gift Annuities

A charitable gift annuity does double-duty by providing both a gift to CMS and a guaranteed lifetime annuity income to you.

Donor Advised Funds

Under an agreement with the CMS, income from your fund is distributed on an annual basis. Your gift, usually cash or securities, provides the funding, and you receive a donation receipt on an annual basis.

Gifts of Life Insurance

Life insurance is a way to make a significant future gift at an affordable current cost, without reducing your estate available to family and friends.

Gifts of Stocks and Securities

If you own publicly traded stocks or mutual funds which have appreciated in value, you pay taxes on them when they are sold. By donating them to the CMS, you substantially reduce capital gains tax and receive an immediate tax benefit.

Gifts to the Endowment Fund

Your gifts to the Endowment Fund generate revenue that forever funds CMS mathematics education and research activities.

Gifts In Kind

Donating gifts-in-kind, such as works of art, books or scientific equipment, is a valuable way of making a meaningful gift. You receive a tax receipt for its fair market value.

Will Bequests

Your donation can be a personal asset, specific cash amount, or a percentage or portion of your estate. Your estate will receive a tax creditable receipt which will reduce income tax payable on your death.

Charitable Remainder Trusts

By placing your assets into an irrevocable trust and appointing a trustee to manage the assets, and by establishing appropriate terms of the trust, you continue to enjoy the income for your lifetime or a specific duration, and give the balance of the assets to the CMS at the end of your life or the specific duration.

Your gift will contribute to life-changing research and collaborations which will positively impact the lives of individuals and communities well into the future.

Choose a plan which:

Costs you little or nothing during your lifetime.

Gives you income, cash, or other benefits.

Delivers immediate tax benefits.

Contrary to popular belief, Estate Planning and Planned Giving are not just for the wealthy. Indeed, for most of us, it is particularly important that we devote our attention to estate planning to insure that our assets (however limited or substantial) are used wisely.

Through planned-giving it is possible to make a contribution which extends beyond us, changes lives, and helps build a better society for generations to come.

The Canadian Mathematical Society is pleased to assist you and your advisor in achieving your giving.

We welcome your inquiries and would be pleased to answer your questions.



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