



Until we are all equal

GIFTS of RRSPs/RRIFs/TFSA

Donating retirement fund assets to Plan International Canada is a tax-smart and effective way to transform your assets into meaningful support for vulnerable children worldwide. Retirement funds are one of the best ways to grow wealth during your lifetime but one of the worst ways to transfer wealth to the next generation, as they are among your most **heavily taxed assets!**

The Advantages

- ✓ The satisfaction of providing a future gift while retaining ownership and use of the fund during your lifetime.
- ✓ A charitable tax receipt for the value of the plan for your estate, which will offset estate taxes.
- ✓ By designating a beneficiary, these assets fall outside your estate, excluding them from probate fees.
- ✓ You can donate all or a portion of your retirement funds to still provide for your family by naming more than one beneficiary.

It's one of the easiest gifts with no cost to you now, 3 simple steps:

1. Request a Multiple Beneficiary Designation Form for your RRSP/RRIF/TFSA from your plan's financial advisor or bank.
2. Fill out the form and name **Plan International Canada** as one of the beneficiaries.
3. Return the form to your plan administrator & please let us know if possible.

Useful Legal Information

Legal name: Plan International Canada

Address: 245 Eglinton Ave East, Suite 300, Toronto, ON M4P 0B3

CRA Charity Registration Number: 11892 8993 RR0001

For more information about gifts of RRSP, RIF or TFSA, please contact:



Michelle BERNARD
Lead, Planned Giving
D: 437-828-8974
mbernard@plancanada.ca



Berna GÜLMİSÂL, MFA-P™
Senior Manager, Planned Giving
D: 437-828-8837
bgulmisal@plancanada.ca

**Plan International Canada strongly recommends that you seek the professional services of a lawyer, accountant, or financial advisor to ensure that your financial goals are considered, your tax situation is reviewed, and your planned gift is tailored to best fit your circumstances.*