

Create a legacy with lasting impact

Establishing a *future giving plan* ensures the legacy you wish to create is realized.



by Community Foundation North Okanagan

Supporting locally owned businesses, farms and charities has become increasingly important as online organizations and fundraisers are rapidly funnelling local dollars away from our most valuable organizations. “Give where you live” and “shop local” messaging can be seen echoed throughout independently owned stores as a way to create awareness that **if you spend locally, the collective community will receive the benefits.**

“When we need trusted and reliable support from the community, we turn to places like the **North Okanagan Hospice Society** to help with end-of-life care; we enjoy the shows brought in by the **Vernon & District Performing Arts Centre**, and in times of crisis – the **Food Banks** offer food and other necessities to our economically vulnerable neighbours.” Leanne Hammond, executive director of the Community Foundation North Okanagan, points out, “It is our collective responsibility to help support these treasured charitable organizations to carry on their roles that sustain and enhance the quality of life in our region.”

Many people want to improve and invest in our communities but often share the common misconception that you need to be wealthy to make an impact with your legacy. Whatever the size of your estate, you can still

contribute to the charities you care about. Chances are your estate is larger than you think it is. At Community Foundation North Okanagan, you can set up a legacy fund in your name with a bequest of \$10,000, which will contribute to the causes you care about long after your lifetime.

According to www.willpower.ca's estimate, if only 3.5% more ordinary Canadians included a gift in their will in the next decade, \$40 billion would be directed to charitable causes. That's the collective power of people that care – and you can be a part of that 3.5%.

There are many ways to create a positive local impact through a gift from your Will. One is by donating to the annual community granting program where donors pool their funds to maximize the financial impact. This empowers responsive grant-making to fund the immediate, emerging, and evolving needs of the North Okanagan region.

Many people leaving a gift in their Will to the Community Foundation also seek to establish a fund, named to honour their legacy or pay tribute to a loved one. This fund will make reliable grants to a cause or a charitable organization. Some donors may choose to give a larger gift from their Will that targets a specific cause for a specified period of time. This is a suitable option for donors who want to make an immediate impact or a significant difference over a compressed timeline.

“A future gift can be included in a Will by adding a simple one-line direction. The gift details are then documented at the



Community Foundation and can be adjusted at any time without the effort and expense of revising the Will,” explains Hammond. “When we receive an estate gift from a donor, it’s very humbling to know they’ve entrusted us to carry out their legacy.”

While leaving a gift in one’s Will makes it possible to leave a much larger gift - remember that you don’t have to be wealthy to create a charitable legacy. You can leave as much or as little as you want - there is no gift too small to make an impact. It only takes a few minutes to leave a gift to charity, but it creates a legacy that lives on for future generations.

Whether you’re thinking about your lifetime philanthropy or supporting your favourite causes as part of your estate plan, **connect with Leanne Hammond today!**

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Our Commitment to You

- We’ll **invest** your gift wisely so that it has a lasting impact.
- Our **trusted** investment experts are here to help your legacy grow.
- We’ll always carry out **your wishes**.
- Whether it’s 10 or 100 years from now, we’ll follow **the plan** you outline for your giving.
- We’ll **honour** you in the way that feels best to you.
- Share your story and **inspire others** to make a difference – or stay anonymous. We **respect** your choice.

www.cfno.org



Community Foundation North Okanagan was created in 1975 as a 360-degree funder and continues to support Arts & Culture, Education, Environment, Health & Recreation, and Social Services.

Make the most of your giving. Contact us today.

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We are dedicated to improving the quality of life in the North Okanagan. By pooling the charitable gifts of donors we create endowment funds and use the investment income to make grants that support a wide variety of charitable organizations. Community Foundations also provide leadership – monitoring our area’s quality of life and convening people, ideas, and resources to help build stronger and more resilient communities.

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