YOUR GUIDE TO LEGACY GIVING



Together we can take lasting action now and in the future

ShelterBox
Disaster relief



THE NEED IS GROWING

Global violence is surging, and the climate crisis is deepening. In the next 25 years, 1.2 billion people – that's around 1 in 6 people alive today – could lose their homes due to disaster, conflict or climate catastrophe.

When faced with numbers like these, it's easy to feel overwhelmed. Many people see the statistics and hope things will improve. But we know that hope alone is not enough. We need to act now, to make sure that no one is left without shelter after disaster.

When you leave a legacy gift, you'll ensure we can respond, so that:

- when people lose their homes to war or conflit, our partners on the ground have trucks filled with tents, water carriers, and kitchen sets ready to go.
- when homes are damaged by cyclones or earthquakes, we can supply appropriate materials to help families to rebuild their homes.
- when droughts cause families to leave their homes in search of water, we can provide not only robust tents, but training and support to restart their lives.

Every year, thanks to your incredible support and the work of our worldwide partners, we provide shelter and essential aid to around 325,000 people.

THE IMPACT YOU WILL MAKE

Thank you for requesting this legacy brochure and considering the incredible impact leaving a gift in your Will could have on families in the future.

It's hard to overstate the significance of the extraordinary generosity shown through the donations we receive via supporters' Wills. It's such a vital source of income and so much of what we do today is a direct result of the generosity of those who came before us.

Right now, families are receiving tarpaulins, tents, cooking sets, and the training they need to rebuild their lives thanks to gifts left in Wills many years ago. I am certain the donors and their families would feel incredibly proud of the life-changing difference their legacy is making.

As we look further into the future, the gifts left to ShelterBox in Wills are going to be more important than ever. We're already seeing a rise in disasters as a result of the climate crisis and violence in our increasingly unstable world.

Like you, we want to make sure we're ready to respond with practical, life-changing action. By leaving a gift in your Will, whatever the size, you can join us.

Your support will help ensure that our teams can plan ahead so they are ready to provide families with the foundation for survival, dignity, and a brighter future

If you have any questions, please give me a call at **647-352-1930** or email me at **plannedgiving@shelterboxcanada.org.**

Thank you for considering ShelterBox Canada.

Warm regards,

Stephanie Christensen
Executive Director
ShelterBox Canada



"My parents would be delighted to know that, as a family, we can stand with another family who are going through their biggest moment of need, and we can do something to help them through that."

- Lindsay Gray, daughter of a ShelterBox legacy donor



WHY WRITE A WILL

Your Will is more than just a legal document. It's one of the most thoughtful steps you can take for your loved ones. By creating or updating your Will, you're protecting those closest to you and giving yourself peace of mind, knowing your legacy is secure.

Your Will is your voice.
It gives you the power to decide exactly how your money, property, and possessions are distributed when you're no longer here. You're also able to protect the people and causes you care about.

Your Will provides clarity.
The decisions you make now will ensure that the people and causes closest to your heart are cared for. This means your loved ones won't have to make tough decisions during what will already be a challenging time, providing clarity and peace for everyone.

Your Will brings comfort.
Your loved ones will take comfort in knowing they are carrying out your wishes. They will also be encouraged that individuals and families around the world will continue to benefit from the legacy you leave.

Don't put it off.
You may feel like there's plenty of time, and we hope there is, but life is unpredictable. Having a Will ensures your wishes are honoured no matter what. It's a simple yet essential step every adult should take, regardless of their age or how much they own.

Your Will can be changed.
It's a living document that you can amend as often as you wish. In fact, it's important to review and update your Will regularly to ensure it continues to reflect your wishes.



WHY I HAVE PLEDGED A GIFT TO SHELTERBOX



"I believe in what ShelterBox does and I believe that the work that ShelterBox does is really important. I love the work they do and the impact that they make globally, and I want that work to continue after I'm gone. I would like those positive effects and ripples to keep on moving."

- Martin Webster
ShelterBox legacy donor

"It makes me feel good to know that by leaving a gift to ShelterBox in my Will, I'm supporting families who have just suffered the most awful disaster that will allow them to get back up on their feet and get going again."

- Chris Prowse
ShelterBox legacy donor



NEED HELP MAKING OR CHANGING YOUR WILL?

1. Consider the type of gift you want to leave

A bequest is a gift directed to a charity like ShelterBox Canada, specified according to your wishes through a provision in your Will. Funds can be bequeathed as a specific dollar amount or asset, or as a percentage of the residual of your estate.

2. How do I include ShelterBox Canada in my Will?

If you already have a Will and would like to include ShelterBox Canada in it, you can still include a bequest.

Ask your legal advisor about the simple process of adding a codicil to your Will. If you need to write your Will, then use the exact wording below depending on the type of gift you are leaving:

Residual Bequest: I give (a ____ % share of) the residue of my estate to ShelterBox Canada, 200-2010 Winston Park Drive, Oakville, ON, L6H 5R7, registered charity number 84628 3208 RR0001, to be used for its general charitable purposes.

Specific Bequest: I give the sum of $(words and figures) to ShelterBox Canada, 200-2010 Winston Park Drive, Oakville, ON, L6H 5R7, registered charity number 84628 3208 RR0001, to be used for its general charitable purposes.

There is no obligation to leave a gift to ShelterBox Canada in your Will, but we're grateful for donations of any size. The decision you make today will ensure that families in years to come have the tools and skills they need to rebuild and recover in the wake of disaster.

3. Let us know

We know leaving a gift in your Will is very personal to you. Our team is on hand if you would like to chat with someone or have questions. You can call us at **647-352-1930** or toll free at **1-855-875-4661,** or email us at **plannedgiving@shelterboxcanada.org**.

What are the tax benefits of leaving a gift in my Will?

A bequest gift is eligible for a charitable tax receipt, which will reduce the overall tax burden on your estate, increasing the inheritance for your loved ones. Once the gift is received, ShelterBox Canada will issue a receipt and send it to your Estate.

Other ways to leave a legacy gift

Gifts of Life Insurance, Beneficial interest in RRSPs, RRIFs, Tax Free Savings Accounts (TFSAs) and Securities, can all help support ShelterBox Canada. We'd be happy to talk with you if you want more information about these options.

HELPFUL HINTS AND TIPS

As you prepare your Will, here are a few things to consider:

1. Think about your loved ones, causes, and charities you'd like to remember. Include full names, addresses, and charity numbers (if applicable).
2. If you have dependents, including children, elderly relatives, or even pets, decide how they will be cared for and supported.
3. As you plan ahead, think about what you own (houses, businesses, items of value, investments) and what you owe (mortgage, loans, overdrafts).
4. It's best to consult with a qualified legal adviser, like a solicitor or a specialist at your bank, who can talk you through the best options for you.
5. Choose between one and four people you trust to act as the executor. They'll ensure the wishes in your Will are carried out. You can choose friends, family members, or your solicitor.
6. When you receive the draft of your Will, read it carefully. If you're unsure about anything, don't be afraid to ask and make changes so it reflects your wishes.
7. You'll need to sign your Will in front of two witnesses, who can't be related to you or will benefit from the Will. They'll also need to sign and date it themselves.
8. Store your Will in a safe place, and let your executor know where it is. Keep it with other key documents, to make things easier when the time comes.

Over the past 25 years, ShelterBox has provided vital supplies and shelter to nearly 3 million people in over 100 countries.



QUESTIONS YOU MAY HAVE

1. I don't have a Will, how can I make one?
We recommend you consult a lawyer or advisor to make sure that all the legal formalities are covered and that your Will is valid. The cost will vary depending on the complexity of your Estate and your Will.

2. Can I make changes to the legacy at a later date?
Yes. You can change your Will at any time by contacting your lawyer or advisor to make ammendments.

3. How will ShelterBox use my gift?
Your gift will mean that when disasters strike or homes are torn apart, we'll be there. It may provide tents, heavy duty tarpaulins, or materials to rebuild homes. It could also provide people with household items or train communities to respond to disasters.

4. What information do I need to provide?
You should tell your lawyer or advisor what you would like to leave to ShelterBox Canada – what percentage of your estate or specific dollar amount or asset – and give them our charity number (84628 3208 RR0001), our full charity name (ShelterBox Canada) and our full address (200-2010 Winston Park Drive, Oakville ON L6H 5R7).

LEGAL TERMS EXPLAINED

When you write a Will, you'll come across some legal terminology. We've put together a little glossary of key words and phrases to help you. Don't be afraid to ask for clarification if there is anything you're not sure of – it's what legal professionals are there for.

Beneficiary: anyone you leave a gift to in your Will or those who will benefit from assets that are held and managed by one person or people, known as the trust or trustee.

Codicil: a document that allows you to add or alter the terms of an existing Will.

Executor: the person/institution you appoint in a Will to carry out your wishes and instructions as stated in your Will.

Probate: is the process of dealing with the property, money and possessions (Estate) of someone who has died. It begins with confirming the person or people who have the authority as executors to administer the estate.

Residual Bequest: a gift of a percentage of what's left of your Estate once all specific gifts, legal expenses, and liabilities have been taken out.

Specific / Fixed Sum Bequest: also known as a cash gift, this option involves making a gift of a specific dollar amount or asset.

Trustee: an executor looking after any part of your estate left in trust.

OUR PROMISE TO YOU



We understand that when it comes to writing a Will, your loved ones are your priority. Writing a Will is extremely personal and we respect that you need time and privacy to make decisions.

We will ensure your gift is used to support those hit by disasters around the world, should you choose to leave a legacy to ShelterBox Canada. Your legacy will help us continue our vital work to reach more families, providing them with emergency shelter where it's needed most.

We are here to support you, if you need us. Stephanie Christensen, our Executive Director, is on hand to answer any questions you may have about how to leave a legacy, how your gift will be used or the work that your generosity will enable.

You can get in touch by calling **647-352-1930,** toll free at **1-855-875-4661,** or via email at **plannedgiving@shelterboxcanada.org.**



BUILDING A FUTURE WITH NURTA

Nurta faced uncertainty head-on — and took action. Your legacy will help others do the same.

"In my rural home, we were farmers. But the long drought took everything from us, even our livestock," recalls Nurta, a mother of seven from Somalia.

Nurta made the bold decision to lead her family on an eight-day journey to Baidoa. The city in southwest Somalia is home to the largest population of Internally Displaced People in Somalia – around 740,000*.

The journey was filled with danger, but Nurta's determination carried them forward. When they arrived, she initially constructed a makeshift shelter as she sought to start a new life.

ShelterBox, along with our partners at the Juba Foundation, provided her family with a durable tent, essential tools, and kitchen utensils. In addition, we helped her secure a five-year land tenure, giving the family the security they needed to build a stable life.

"Coming to Baidoa was a challenge, but I knew I had to keep going for my family. Now, with this shelter, I finally have a place to call home," she says.

Determined to thrive, Nurta began farming and set up a small shop to sell produce. "With ShelterBox's support, I can now focus on growing my business, which allows me to provide for my family."

Nurta's resilience and commitment is only part of the solution. Your legacy will enable people in crisis to take action with practical tools and equipment that will bring hope and stability.

*Medecins San Frontiers/Doctors Without Borders

"Coming to Baidoa and adjusting to life here was difficult, but with the new shelters, I have a proper place to call home. With ShelterBox's support, I can now focus on growing my business, which allows me to provide for my family."



"I will give ShelterBox a gift in my Will. It will be a small gift, to help, to empower, to bring people together, to make that difference."

- David Crook
ShelterBox legacy donor



If you have any questions, please don't hesitate to contact Stephanie Christensen our Executive Director – or another member of the team – at 647-352-1930, toll free at 1-855-875-4661 or via email at plannedgiving@shelterboxcanada.org

ShelterBox | Rotary

ShelterBox Canada
200-2010 Winston Park Drive
Oakville, ON L6H 5R7

T 647-352-1930
E plannedgiving@shelterboxcanada.org
W www.shelterboxcanada.org

ShelterBox Trust and Rotary International are official Project Partners in disaster relief. ShelterBox and the ShelterBox Canada affiliate are registered charities, independent of Rotary International and The Rotary Foundation.
Charitable Registration number #84628 3208 RR0001