



McGill

Bequests and
Planned Gifts

Letter of Notification and Recognition

Thank you for your legacy gift to McGill!

Legacy gifts make a powerful, lasting impact on the University and we take great care and pride in recognizing and thanking our donors.

We are honoured to invite you to join our McGill 1821 Society or the Macdonald Legacy Society. As a member, you will receive VIP access to the McGill Faculty Club, Tadjia Hall Faculty Club, invitations to our annual *Afternoon Tea with the President*, additional McGill events, and updates on key developments at the University. You will also receive a certificate and a commemorative pin.

To inform us of your plans, we invite you to complete the following information. Providing this information enables the University to plan and administer your future gift in accordance with your wishes.

Please be assured that this letter will always remain strictly confidential. It is not legally binding and does not constitute a legal promise of any future donation to McGill University. We understand that bequests are revocable and that your estate plans may change.

1. Recognition - please check one:

☐ Yes, please include me in the McGill 1821 Society/Macdonald Legacy Society and publish my name on the recognition virtual listing. My name should appear as follows:

☐ Yes, please include me in the McGill 1821 Society/Macdonald Legacy Society, but do not publicly recognize me.

☐ No, please do not include me in the McGill 1821 Society/Macdonald Legacy Society.

Continued on the next page

2. My Future Gift Information

I wish to inform you that my current estate plans include McGill University as a beneficiary as follows (please check all that apply):

- | | |
|--|------------------------|
| <input type="checkbox"/> Bequest in my will (specified amount or a percentage) | Estimated value: _____ |
| <input type="checkbox"/> Life Insurance Policy | Estimated value: _____ |
| <input type="checkbox"/> Retirement Plan Asset | Estimated value: _____ |
| <input type="checkbox"/> Charitable Remainder Trust | Estimated value: _____ |
| <input type="checkbox"/> Donor Advised Fund | Estimated value: _____ |
| <input type="checkbox"/> Other. Please describe: _____ | |

My current plans indicate that my estate gift is:

- ☐ For McGill's Greatest Needs
- ☐ Designated specifically for: _____
- ☐ Not yet designated. Please contact me to discuss options.

Name: _____ Birth date: _____

Degree: _____ Graduation year: _____

Address: _____ City: _____

Province/State: _____ Postal/Zip Code: _____ Country: _____

Email: _____ Phone: _____

This letter is to inform McGill University of my wish to support its continued vitality and positive impact on generations of future students and in the community, and to confirm my preferences as to recognition. I understand that this letter will remain strictly confidential and is not legally binding. This letter does not replace my will or take precedence over any other legal document.

Signature: _____ Date: _____

**Please return this form
by mail or email:**

McGill University
Bequests and Planned Gifts
1430 Peel St., Montreal,
Quebec, H3A 3T3
plannedgifts@mcgill.ca

*Our legal name: "McGill University" or
"Royal Institution for the Advancement of Learning"*

*Our Charitable Registration Number for Revenue Canada is:
11912 8981 RR0001*

*Our tax-exempt number for the IRS in the United States is:
EIN-98-6001153*

Questions? Comments?

Please contact us at:

Phone: 514-398-3560

Email: plannedgifts@mcgill.ca
[giving.mcgill.ca/ways-give/
give-tomorrow](http://giving.mcgill.ca/ways-give/give-tomorrow)