



Archdiocese of Regina
Development Office

Archdiocesan Pastoral Centre
445 Broad Street North, Regina SK S4V 0J6
306-352-1651 x220
www.archregina.sk.ca

Charitable Bequests and Your Church

The Archdiocese of Regina can be designated as a beneficiary in your will. Since the gift is deferred, there is no immediate income tax benefit associated with a bequest; however, this type of gift is eligible for a tax receipt at the time that it is received by the church which will generate tax-savings for your estate. In addition, the upper-limit of the tax credit that can be claimed by an estate is higher than that which applies to gifts made during one's lifetime allowing you to take greater advantage of the savings generated by a larger gift.

Your bequest to the Archdiocese of Regina may be arranged as one of the following options:

- A percentage of your estate
- The residue of the estate (an amount from the remainder value after all specific bequests and expenses have been paid out of the estate)
- A specific dollar amount

An **unrestricted** bequest allows the Archdiocese to use your gift where the need is greatest. Unrestricted bequests allow for the broadest possible flexibility for determining how your gift should be used by the Archdiocese of Regina.

A **restricted** bequest is a given with a specific purpose in mind. It may be directed in support of a particular parish, ministry program or project. You may choose to direct a gift to your parish through a bequest to the Archdiocese of Regina. This strategy allows the Archbishop to redirect your gift appropriately, according to your original intentions, in the unusual circumstance that the parish you have chosen is no longer in operation.

The drafting of a will should be arranged with the involvement of legal counsel. It is important that you include the correct legal name and charitable registration number in your documents.

The legal name for the Archdiocese of Regina is:

“Archiepiscopal Corporation of Regina” Charitable Registration # 106720253 RR0001

Here is an example of suggested wording for Unrestricted Use:

I give and bequeath to the Archiepiscopal Corporation of Regina, Regina, Saskatchewan (106720253 RR0001) the sum of \$_____ (specific amount) or _____% (a percentage) of the



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residue of my estate to be used for its general purposes at the discretion of the Archbishop of Regina.

Here is an example of suggested wording for Designated Use:

I give and bequeath to the Archiepiscopal Corporation of Regina, Regina, Saskatchewan (106720253 RR0001), the sum of \$_____ or _____ % (percent) of the residue of my estate to be used for _____. ** If, in the opinion of the Archbishop of Regina, it should become impossible, inadvisable, or impractical to use this gift for this specific purposes(s), then the Archbishop may in his discretion use the gift to the best advantage for the Archdiocese of Regina, keeping in mind the spirit of the gift intent.

**Examples of Designated Use are (but not limited to):

- To be used for the Lay Ministry Program
- To be used to enhance the Marriage and Family Life Program
- To be used for any program or ministry related to Youth in our diocese
- To be used to support my Parish _____, Town, Province, Postal Code
- To be used to support Clergy and Religious Life
- To be used to support the First Nations Ministries
- Etc. See the Archdiocese of Regina website for more information on current programs and ministries.

If your financial plan includes a bequest for the Archdiocese of Regina in your Will, we would like to hear from you. We can then review the terms of the bequest with you, particularly if it is restricted, to ensure that we will be able to comply with your wishes. Please contact Christina Attard, Development Director at the address above, by email at cattard@archregina.sk.ca or by telephone at **306-352-1651 x220**.

We also encourage you to share your intention to support your Church with your family and those close to you. Your bequest gift is a witness to them of the importance of your faith in your life and sharing this information will assist them in honoring your wishes and your memory in the future.

All bequest intentions and details are kept confidential by the Development Office unless express permission is received from the donor. We invite those considering a bequest gift to share our contact information with their lawyer or other professional advisors in order to ensure that your intentions are correctly documented.

This information is general in nature and does not constitute legal or financial advice, and should not be relied upon as a substitute for professional advice. We strongly encourage you to seek professional legal, estate planning and/or financial advice before deciding on your course of action.