

Planned Giving Response Card

We would be pleased to assist you with your gift planning. Please fill out the following card and mail it to the address below:

- I would like to arrange a meeting.
Please call me at the number provided below.
- I have made a provision for the Douglas Institute in my will.
- I have named the Douglas Institute as a beneficiary of a life insurance policy.

Name: _____

Address: _____

City: _____

Province: _____

Postal code: _____

Telephone: _____

Email: _____

We are a registered charity BN: 10146 9609 RR0001.
We have a policy which protects donor and volunteer privacy
(request or read the policy on our website).

Douglas

INSTITUT MENTAL HEALTH
UNIVERSITAIRE EN UNIVERSITY
SANTÉ MENTALE INSTITUTE
FONDATION FOUNDATION

6875 LaSalle Blvd.
Montreal (Quebec) Canada H4H 1R3
Telephone: (514)762-3003
Fax: (514) 888-4072
Email: foundation@douglas.mcgill.ca
www.douglasfoundation.qc.ca

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HELP SHAPE A FUTURE WITHOUT MENTAL ILLNESS

Planned Giving
in Support of the Douglas Institute
and Mental Health

Changing
lives through
mental health
discoveries and care



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What Is Planned Giving?

Planned giving is a powerful form of philanthropy that allows you to arrange to make a gift today, but to defer that gift to some time in the future, usually through a will. You typically make this gift from your assets, and not from your current disposable income, so you can give generously without putting a drain on your current standard of living. A planned gift can have substantial tax advantages, too. By leaving a charitable gift for the future, you transmit your values to those who come after you. You let them know which causes are important to you.

Why Make Your Gift to the Douglas?

Your planned gift to the Douglas conveys a key message to our children, and our children's children. You convey to them that mental illness is devastating for the person who has it, and for society, and must be prevented and treated. Through your gift you also transmit your confidence that the Douglas Institute will deliver mental health research breakthroughs and state-of-the-art care, shaping a future without mental illness.

The Douglas Is a Worthy Guardian

When you make a planned gift to the Douglas, you appoint us the guardian of your values, beyond your lifetime. We will be a worthy guardian. Since we were founded in the 19th century, we have consistently distinguished ourselves as leaders in mental health research and treatment. We are committed to holding our leadership position and to maintaining the world-class talent and institutional strength necessary to deliver pathbreaking mental health discoveries, and compassionate and effective care, well into the future.

Your Gifts Make Us Strong

Throughout our history, the Douglas has relied on bequests from generous members of our community to strengthen our institution, and help us to meet the mental health needs of people and their loved ones in an ever changing world. Often bequests are invested in perpetuity to generate a stable flow of income that allows us to fund urgent needs and meet unforeseen opportunities.

Canadians Leaving Their Legacy

Your planned gift to the Douglas will place you among a growing number of Canadians who are proving the power of philanthropy by making planned gifts to the charity of their choice.

Planning Giving Options

If you are considering a planned gift to the Douglas, consider a bequest or a gift of insurance. These options are described below.

A Bequest by Means of Your Will

A charitable bequest is the most common form of planned gift. By including the Douglas Foundation as a beneficiary in your will, you make a gift that comes out of your estate and does not affect your resources while you are living and still need them. You can make a bequest of cash or property. If you wish, you can make your bequest a residual bequest -- this is a gift of whatever remains after all other specific individual bequests are paid. When you make a bequest, it is not irreversible. Should your circumstances change, you can modify your bequest.

A Bequest Can Have Tax Advantages

A bequest can reduce the taxes paid by your estate. When you make a donation through your will, the tax credit can be claimed up to 100% of net income in the year of death.

To Leave a Bequest to the Douglas, You Can Use the Following Language in Your Will:

"I give and bequeath the sum of \$____ or (____% of the residue of my estate) to the Douglas Mental Health University Institute Foundation in Montreal, Quebec, Canada for the purposes of the Institute and its greatest needs." If you are considering designating your bequest to a particular area of research or care, please contact us first or consult our website for the appropriate language.

A Gift of Life Insurance

A gift of life insurance can allow you to give a much larger gift to the Douglas than you might otherwise be able to give. When the policy is paid out, the gift amount may exceed the total premiums that you have paid for the policy. If you have an existing life insurance policy, you may choose to transfer ownership to the Douglas when the policy is no longer needed for family protection.

Life Insurance Gifts Can Have Unique Tax Advantages

Transferring ownership of an existing policy to the Douglas can entitle you to a tax credit for the cash surrender value of the policy. Premium payments also qualify for a tax credit. Or, you may purchase a new policy with the Douglas Foundation as the owner and beneficiary. You would then pay the premiums directly to the Douglas which would pay the insurance company. You will receive an annual charitable receipt for the premium amount.

Consult an Independent Advisor

If you are considering a planned gift to the Douglas, you should seek the advice of a lawyer, notary, or financial advisor, to insure that your gift meets your personal goals. Information in this brochure is not intended as a substitute for professional advice.

Exploring Opportunities

A member of the Douglas Institute Foundation staff would be pleased to meet with you and your family to discuss planned giving opportunities in support of the Douglas Institute. To arrange a meeting, please call 514-762-3003. You can also send an email to foundation@douglas.mcgill.ca or fill out the attached form and return it to us. Your inquiry will be strictly confidential.

Please Let Us Know About Your Gift

If you have already made a planned gift to the Douglas, please let us know by filling out the attached card, or by contacting the Foundation at 514-762-3003. We would like to express our gratitude for your support and keep you informed of our progress in mental health research, treatment and education.

More About The Douglas Mental Health University Institute

The Douglas is a university institute in mental health, affiliated with McGill University and the World Health Organization. We are recognized as an international leader in mental health care, education and research. Our expertise includes Alzheimer's Disease, depression, schizophrenia, eating disorders, attention deficit disorder, bi-polar disorder and suicide prevention. We are committed to understanding the causes of mental illness, improving treatments, developing cures and eliminating stigma.

The Douglas Institute Foundation

When you contribute to the Douglas Institute Foundation, your gift will be used to fund the Douglas Institute's cutting-edge research programs, pilot projects in patient services and care, and educational initiatives for professionals and for the general public. In addition, your gift may provide operational funding for mental health projects in the Third World.

For more information on Planned Giving, consult our website at www.douglasfoundation.qc.ca