



Leave a Legacy, For All the World to See

A Will Preparation Guide

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*I cannot do all the good the world needs but
the world needs all the good that I can do.*

- Jana Stanfield



Why leave a gift in your will?

Right now, you have the opportunity to decide the impact you will make through your will. You can leave a gift that will demonstrate your commitment to a cause that's important to you, allowing you to ensure that the good work of an organization you trust will live on to help future generations.

A gift in your will could be the most rewarding gift you make. You leave a legacy of saving lives. Because of you, children will be able to attend school and parents can provide for their families. You will provide women with training and fulfilling opportunities to make a huge impact in their communities. All because you care about people who need your help – no matter where they live.

Please consider joining your fellow Operation Eyesight family, like [Margaret, a nurse from Calgary, AB](#), or [Elizabeth, a historian from Osgoode, ON](#), in leaving a legacy, one that will leave our world a better place.

What is your legacy? Consider a gift in your will today and significantly reduce your estate taxes, helping you continue to provide for your loved ones and favourite organizations. These gifts are easy to arrange and won't affect your income today.

Leave your legacy at Operation Eyesight, and help us continue to do good for humanity.

Things to keep in mind

If you already have a will, you should consider updating it if any of the following statements are true:

- It has been three years or more since I last reviewed my will
- My will was drawn up while living in a different province or country
- There has been a birth in the family
- There has been a death in the family
- There has been a change in my marital status
- The beneficiaries named in my will are deceased
- I would like to add or withdraw beneficiaries
- The executor and/or alternate named in my will are deceased or are incapable of performing these duties
- I wish to change my choice of executor
- There have been changes in my asset base
- My charitable giving plans have changed bequest options

Everyone's circumstances are different and here are a few of the special considerations that can affect a will. They may or may not apply to you, but we suggest you use this list as a guide and add other considerations that may affect your estate.

If divorced or separated:

- Do you want to provide for your former spouse?
- Is there some property or other assets you and your former spouse jointly own?
- Are there specific obligations required by your divorce or separation agreement?

If re-married:

- Are there stepchildren you wish to include in your will?

If you are living common-law:

- Is your relationship formalized through any legal agreement?
- Have you clarified how you wish your estate to be divided among family, friends and your common-law spouse?

If widowed:

- Have your assets changed significantly?
- Do you have any rights in a trust created by your late spouse?
- Are there pension or death benefits from your spouse that would be part of your estate?
- If you already have a legal will, is your former spouse still named?

If you have brothers, sisters or parents included in your will:

- If they predecease you, what do you wish to do with their bequests?
- Are there parents or other adults for whom you wish to provide?

Change in children's status:

- Are any of your children minors, requiring legal guardians?
- Do some children have special needs?
- Do you have deceased children who left surviving children?

If you own a major interest in a business:

- Do you need special arrangements for the management of the business after your death?
- Are there buy-out clauses?

Other special circumstances could relate to out-of-the country property, dual citizenship, military service, an inheritance you might have received that has someone named to receive it after you die, investments you share with someone else, etc. You might wish to make special provisions in case you and your spouse both die within a short period of each other.

Choose which type of legacy gift you'd like to arrange

There are many ways to leave a lasting legacy. Deciding which type of charitable bequest is right for you is just as important as your decision to leave one. The option you choose depends on your unique circumstances and financial goals. Here are some options available to you:

Type of bequest	Suggested wording for your will
General bequest where you decide to give a specific item, amount or percentage of your estate.	"I give to Operation Eyesight Canada (Charitable Number 11906 8955 RR0001) the sum of \$ [or % of my estate] to be used for the general purposes of the organization." "I give to Operation Eyesight Canada (Charitable Number 11906 8955 RR0001) my [something specific, such as jewelry or art collection]."
Residuary bequest where you intend to give any leftover assets after other terms of your will have been satisfied.	"I give to Operation Eyesight Canada Inc. (Charitable Number 11906 8955 RR0001) all [or %] of the rest, residue and remainder of my estate."
Contingency bequest where you give all or a portion of your estate to Operation Eyesight if your named beneficiary does not survive you.	"If [name of specific person] does not survive me, then I give all [or %] of the rest, residue and remainder of my estate to Operation Eyesight Canada (Charitable Number 11906 8955 RR0001)."

In making changes to your will, or when drafting a new will, you should consult with your own legal advisor. It is the lawyer's/notary's responsibility (according to your province of residence) to write the actual words.

Note: You should consult your charity of choice to ensure that they are properly named in your will and to make sure your bequest can be used in the way you intend, especially if you'd like to designate it towards a particular country or project.

Will Preparation Worksheet

The following pages that will help you prepare the information you need for your will. These sheets can help you reduce the time your lawyer/notary needs to spend with you and will help focus on how and to whom you wish to leave your property. Use the worksheet to list all the people you wish to provide for, and include their birth date (for children), complete address, and relationship to you. Remember to list charitable organizations you wish to remember.

What personal information is needed?

Date this information was prepared:

Name:

Street:

Province:

Home phone:

Birth date:

Date of previous will:

Who has access to your previous will:

City:

Postal code:

Work phone:

Place of birth:

Location:

Marital status:

Place of marriage:

Is there a marriage contract or prenuptial agreement? Yes / No

Name of spouse:

Street:

Province:

Home phone:

Birth date:

City:

Postal code:

Work phone:

Place of birth:

Previous marriage(s):

Names, addresses and ages of living children:

Names, addresses of other persons to be named in the will:

Names and addresses of charitable organizations to be named in the will:

Executors and alternate executors

The choice of executor and alternate executor are important ones. Your executor should be a mature person capable of conducting business affairs. Your spouse, a relative or a friend could be possible choices. Because an executor could predecease you or be unable to serve, it is important to also choose an alternate. Trust companies can also act as executors, for a fee, and will always be able to serve.

Executor's name:

Relationship:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Alternate executor's name:

Relationship:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Guardian for underage children

If you have underage children, you should name a guardian and an alternate guardian you trust with their upbringing and with management of their business affairs.

Guardian's name:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Alternate guardian's name:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Professional Advisors

Several people may maintain records important to settling your estate. Many law firms have facilities for storing original wills, and your accountant may have tax records.

Accountant contact name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Lawyer (notary in the province of Quebec) contact name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Financial institution (bank, credit union, trust company) Contact Name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Financial planner/advisor contact name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Insurance agent contact name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Spiritual advisor contact name:

Firm:

Street:

City:

Province:

Postal code:

Home phone:

Work phone:

Email:

Location of important documents:

Location of my tax records:

Location of my safety deposit box:

Location of my original birth certificate:

Location of my military records and pension documents:

Details of my funeral arrangements/wishes are as follows:

Distribution of my estate

When planning your estate, you do not need to precisely describe how every individual item should be distributed. If there is a specific item or sum of money you wish to leave to someone, or if there has been a change in your wishes from a previous will, explain below.

When distributing money, consider dividing it by percentages, rather than in fixed amounts to take into account changes in the size of your estate. For possessions, consider listing some specific items that are particularly valuable or have sentimental meaning, and then designate one individual to receive the “balance of my personal possessions”.

Person or organization	Amount or percentage or description of item(s)

Residual Gifts

In your will, you may divide the residue of your estate (what is left over after specific bequests) among people and organizations that you determine. Note your intentions, or changes below.

Person or organization	Percentage of residue of your estate



Organizing your assets

Making a list of your assets and your current liabilities makes it easier to divide your estate and helps your lawyer/notary guide the preparation of an actual will.

Assets	Value
Principal Residence	
Other Real Estate	
Investments	
RRSPs	
RRIFs	
RPPs	
Stocks	
Bonds	
Life Insurance	
Pension Benefits	
Bank Accounts	
Trust Company Accounts	
Business Interests	
Jewellery	
Vehicles	
Art	
Valuable Furnishings	
Other	
Total Assets	\$

Liabilities	Value
Mortgages	
Second Mortgage	
Credit Cards	
VISA	
MasterCard	
American Express	
Other	
Bank Loan	
Personal Loan	
Business Loan	
Car Loan	
Car Lease	
Other	
Total Liabilities	\$

Thank you!

Thank you so much for your interest in Operation Eyesight's legacy gift program. This is an incredible opportunity for you to leave a lasting legacy of sight and hope for the most vulnerable in Africa and South Asia. **By leaving a legacy gift to Operation Eyesight in your will, you can join the global movement to change the lives of people who are affected by avoidable blindness in developing countries.**

You can be confident that your legacy will be safe and stewarded in the most effective way possible. The funds you provide to Operation Eyesight will be used strategically and efficiently to create lasting change by putting an end to avoidable blindness and creating a culture of empowerment for generations to come.

Discuss your legacy gift with your family and advisors

Please note that this document does not provide any legal advice, but only offers general information that may be useful. Please speak with your lawyer or financial planner to make the necessary arrangements in your will or estate plan.

It's important that your family is aware of your intentions to leave a legacy gift to Operation Eyesight so they can understand and support your charitable goals. It's also a great opportunity for you to share why you have chosen to leave a legacy gift to Operation Eyesight and why you want our work to continue.

Contact us

Please consider letting us know that you plan on leaving a legacy gift to Operation Eyesight so that we can record your gift intention and ensure that you are properly recognized, if that is your wish. We are happy to work with you and your family confidentially to ensure all your legacy gift goals are met. We are available to answer your questions and discuss different options.

Thank you for considering this very special and personal gift. Together, we can continue to achieve great things – for all the world to see!



Phone: +1 403.283.6323
Toll-free (Canada & the US) 1.800.585.8265
philanthropy@operationeyesight.com
operationeyesight.com