

## How to plan a gift?

Steps prior to planning a gift.

### **1. Which charitable organization should you give to?**

Think of a charitable organization or a cause that you would like to support. It is possible that you or someone you know may have benefitted from the services of a specific organization. Do you volunteer or do you believe in the mission and the values of a particular charity? Charitable organizations must be registered with the Canadian Revenue Agency; to check, contact 1 888 892-5667 or [www.ccr-aadrc.gc.ca](http://www.ccr-aadrc.gc.ca)

**You can also consult the [Directory of LEAVE A LEGACY™ Québec partner organizations](#)**

### **2. What is the objective of your donation?**

Gather information on the organization of your choice. What is its mission and accomplishments, what are the possibilities concerning donations and how can your donation help them attain their objectives. Make sure that you use the complete official name (legal name) of the charitable organization. Also ascertain the possibility of associating the name of a loved one to a donation, in order to perpetuate their memory, if desired.

### **3. Evaluate your personal balance sheet**

Make a list of all your assets to work out an approximate value of your estate.

### **4. Consult a legal or financial advisor**

A legal or financial advisor will act as the intermediary between a charitable organization and yourself in order to make sure you benefit from the maximum fiscal advantages. This person works in fields such as accounting, law, insurance or financial planning.

[Where can I find a legal or financial adviser?](#)

### **5. If you wish, inform the charitable organization along with your family and close friends of your decision**