

## A GIFT TO NATURE FOR A BETTER TOMORROW

Planned giving is an integral part of tax, estate and financial planning.

Planning a gift for nature allows you to turn your values into lasting, concrete actions—even after your passing. A planned gift is a donation arranged in advance, while a testamentary bequest is a provision included in a will. Putting careful thought into your will lets you secure your family's future. Once your loved ones have received their fair share, bequeathing a legacy to a nature conservation organization will protect biodiversity for the benefit of generations to come.

### Legacy or In Memoriam Gifts

A gift for the conservation of natural habitats allows you to leave a legacy. You can name a protected area after yourself, for example, or honor the memory of a loved one.



### WHAT IS A GIFT BY WILL OR TESTAMENTARY BEQUEST?

A testamentary bequest is a gift stated in a will, that takes effect after your passing. It makes it possible to support important causes such as nature conservation without having to pay out during your lifetime.





## YOU CAN BEQUEATH:

- **Money, investments** (TFSA, RRSPs, RRIFs, shares (publicly traded securities), cryptocurrency, etc.)
- **Assets** (real estate, high valuables)
- A piece of **land** to be preserved in perpetuity
- A **life insurance policy**: the organization will be listed as a beneficiary
- A charitable **annuity or trust**

## WHY MAKE A BEQUEST FOR NATURE CONSERVATION?

**Protect** natural environments in perpetuity

Leave an sustainable environmental **legacy**

**Lower the inheritance tax** on your estate (obtain a tax receipt for a charitable donation that qualifies for a tax credit)

**Eliminate the capital gains tax** on certain property and assets included in the donation

**Make a meaningful gesture** even if you do not have the financial means at this time

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## BEQUEATHING MY LAND TO PROTECT BIODIVERSITY FOREVER

You can decide to give your land to Appalachian Corridor upon your passing.

### Here's what you need to know:

- Donating land for nature conservation may reduce the tax your estate will have to pay.
- When donating land through a bequest in your will, Appalachian Corridor will conduct an appraisal upon receipt of the donation to confirm the feasibility of a conservation project.
- If your land has ecological value, your land donation will qualify for the Ecological Gifts Program, and the charitable receipt will be larger.

- If you wish, you can request a land appraisal before your passing and implement conservation measures during your lifetime.
- It is always possible to protect your land even if the natural areas do not qualify for the Ecological Gifts Program.
- For agricultural land, it is possible to subdivide the property without having to apply to the Commission de la protection du territoire agricole du Québec (CPTAQ), subject to applicable legal provisions.
- We encourage you to consider adding a supplementary amount to your land donation to establish a management fund dedicated to property maintenance and covering recurring costs, etc

## HOW DO I MAKE A TESTAMENTARY BEQUEST?

### 1 Write a will:

- Clearly indicate your wishes and the assets you want to bequeath.

### 2 Name the beneficiaries:

- For example, a conservation organization such as Appalachian Corridor.
- We also invite you to talk to your loved ones about your philanthropic gesture.

### 3 Choose the type of bequest:

- **Specific:** A specific asset, for example: I bequeath, by particular title, the amount of \$ \_\_\_\_\_ (or my cadastral parcel: \_\_\_\_\_) to Appalachian Corridor, a charity duly registered with the Canada Revenue Agency under number: 854117488RR0001, and located at 466 Principale Street in the town of Eastman, province of Quebec, J0E 1P0.

This bequest will support Appalachian Corridor's mission to consolidate and leave a legacy of a vast corridor of natural areas to be protected in perpetuity.

- **Universal:** All of your assets. For example: I bequeath all of my assets to Appalachian Corridor.

- **Residuary:** What remains after your other bequests. For example: I bequeath all (or \_\_\_%) of the remainder of my assets to Appalachian Corridor.

- Work with your notary or lawyer, you can also add clauses that gives your executor full authority to act in the estate's best fiscal interest. This will optimize the tax credits for charitable donation to an organization.

### Consult professionals:

- Legal advisor: notary or lawyer.
- Financial advisor (planner, accountant, actuary, life insurance agent, or tax specialist).
- An Appalachian Corridor advisor to discuss various conservation or donation options.



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**LEAVE NATURE AS YOUR LEGACY. YOUR DONATION WILL HELP PROTECT THE ECOSYSTEMS, BIODIVERSITY AND LANDSCAPES OF OUR BEAUTIFUL REGION FOR YOUR CHILDREN AND GRANDCHILDREN AND GENERATIONS TO COME.**

**GOOD TO KNOW**

- There is no minimum amount required.
- You can **amend, modify or revoke** your will at any time.
- If you already have a will, you can **add a codicil** (amendment).
- Your planned donation can be **immediate or deferred**.
- **If you have already included Appalachian Corridor in your will, please let us know.** This commitment is in no way binding and your last wishes will remain strictly confidential. We would just like to thank you for your remarkable contribution to the future of our planet.



To learn more about planned giving that benefits nature,

**CONTACT US: [INFO@CORRIDORAPPALACHIEN.CA](mailto:INFO@CORRIDORAPPALACHIEN.CA)**



**[info@corridorappalachien.ca](mailto:info@corridorappalachien.ca)**  
466, rue Principale, Eastman QC JoE 1P0  
450 297-1145



**APPALACHIANCORRIDOR.CA**