

Your legacy to end MS: Life Insurance

“I considered many options but ultimately decided to purchase some additional life insurance payable to the Society on my death (at a very modest cost, I might add). It was the kind of gift that allowed me to balance my desire to benefit the Society with my responsibilities to my girls. I’m fortunate enough to be in a position where this type of gift is possible for me.” Melanie Yach



What is a gift of life insurance?

Gifts of life insurance are practical, provide an immediate tax credit to you and are the second most common form of legacy gift. You can create a significant future legacy through a small annual gift – even someone of modest means can make a sizeable gift. There are two options available regarding gifts of life insurance to the MS Society:

1. Name the MS Society the owner and beneficiary of an existing or a new life insurance policy.
2. Name the MS Society as a beneficiary of a new or existing policy.

What are the benefits?

You can give a gift of life insurance to the MS Society by talking to your financial planner, and it’s very easy to do. Here are some more specific benefits to you:

- You may receive an immediate tax credit for your gift.
- You have many choices in products, price ranges and payment periods to best suit your preferences and your circumstances.
- There is no reduction in the value of your estate.
- Proceeds from your gift are paid directly to the MS Society and not subject to probate and estate fees as your life insurance exists outside the estate settlement process.

What are my next steps?

1. Make an appointment with your financial planner.

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Life Insurance

2. Create a life insurance policy that best suits your needs, naming the MS Society as the beneficiary, or owner and beneficiary of the policy.
3. Contact the MS Society to inform us of your gift.

Who can I talk to?

You can connect with us at any time to discuss your legacy options. Please contact your local MS legacy expert at 1-800-268-7582 or MSlegacy@mssociety.ca. Your questions will be kept confidential and no commitment is required.

Disclaimer: This brochure is not intended as legal or financial planning advice. When considering any legacy gift, you should always consult your professional advisor(s). Charitable Registration # 10774 6174 RR0001



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