

HOW TO USE YOUR

Statement of Gift Intent

A simple guide to sharing your legacy wishes with Calgary Seniors

What is a Statement of Gift Intent?

A Statement of Gift Intent (sometimes called a Letter of Intent or Bequest Intent Form) is a simple, non-binding document that lets Calgary Seniors know you're planning to leave a gift in our direction, whether through your Will, a life insurance policy, a registered fund, or another means.

It is **not a legal document** and does not change your Will or commit you to anything. It is a thoughtful way to share your wishes so we can plan ahead, honour your generosity, and stay connected with you.

Completing Your Form - Step by Step

1 Fill in Your Information

Enter your name, address, phone number, and email. This allows us to stay in touch with you and recognize your generosity appropriately over time.

2 Select Your Gift Type

Check the box(es) that describe how you intend to give. Options include a Bequest in your Will, Life Insurance, registered funds (RRSP/RRIF/TFSA), publicly traded securities, or another form. You can select more than one.

3 Indicate the Direction of Your Gift

Tell us whether you'd like your gift to go to Calgary Seniors' General Fund (flexible, immediate impact) or to the Endowment Fund held at The Calgary Foundation (grows in perpetuity). You can also leave a note about any specific wishes.

4 Choose Your Recognition Preferences

Let us know whether you'd like to be recognized publicly as a legacy donor, or whether you prefer to remain anonymous. Either choice is equally meaningful to us.

5 Sign and Date

Add your signature and the date. If you are completing this form with a spouse or partner, both names may be included.

6 Return the Form

Send your completed form by email to amurphy@calgaryseniors.org or by mail to Calgary Seniors' Resource Society, Attn: Allie Murphy, 3639 26 Street NE, Calgary, AB T1Y 5E1.

Common Questions

Does completing this form change my Will?

No. Your Will is a separate legal document. This form simply lets us know your intentions. You should always work with a qualified lawyer or estate planner to make changes to your Will.

Can I change my mind?

Absolutely. You can update or withdraw this statement at any time by contacting Allie Murphy. Your wishes may change, and that's completely understood.

Is my information kept private?

Yes. All information shared on this form is kept strictly confidential. Your contact details will never be shared without your written consent.

What happens after I return the form?

Our Fund Developer, Allie Murphy, will reach out personally to welcome you, answer any questions, and discuss how your gift will be used and recognized. You'll be invited to any special legacy events and kept updated on the impact of your generosity.

Does this count toward the Mother's Day matching gift?

Yes! Statements of Gift Intent received between May 1 and May 31, 2026 count toward the \$10,000 matching gift generously offered by Heather Poole. Your intent to give is a powerful act, and it's being matched.



Questions? We'd love to talk.

Allie Murphy, Fund Developer

amurphy@calgaryseniors.org | 403.266.6200

calgaryseniors.org

LEGACY GIVING

Statement of Gift Intent

Calgary Seniors'
Resource Society

calgaryseniors.org

Your intent. Your legacy. Your gift.

By completing this Statement of Gift Intent, you are sharing your thoughtful decision to leave a future gift in support of Calgary's seniors. This form is **not legally binding**, it is an expression of your generosity and a valuable planning tool that helps us honour your wishes and stay connected with you over time.

1. YOUR INFORMATION

First Name

Last Name

Street Address

City

Province / Postal Code

Phone Number

Email Address

2. TYPE OF GIFT INTENDED

Please select all that apply:

- Bequest in Will (specific, residual, or contingent)
- Gift of Life Insurance
- Gift of RRSP / RRIF / TFSA
- Gift of Publicly Traded Securities
- Other

If 'Other', please describe:

Estimated Value (optional)

3. DIRECTION OF YOUR GIFT

I would like my gift directed to: (select one)

General Fund

Used where the need is greatest to support seniors today.

Endowment Fund

Grows in perpetuity through The Calgary Foundation, supporting seniors forever.

Any specific wishes or conditions (optional):

4. RECOGNITION PREFERENCES

I/We give permission for my/our name(s) to be recognized publicly as a legacy donor.

I/We prefer to remain anonymous.

Note: Your personal contact information is kept strictly confidential and will never be shared without your written consent.

5. ACKNOWLEDGEMENT & SIGNATURE

I/We confirm that this is a voluntary expression of my/our intent and not a legally binding obligation. I/We understand that Calgary Seniors will use this information to honour my/our wishes, plan for the future, and stay in respectful contact. I/We understand that my/our Will or estate plan is a separate legal document and encourage consulting a qualified advisor when making updates.

Signature

Date

Printed Name

Printed Name of Second Donor (if applicable)

Return This Form By Mail:

Calgary Seniors' Resource Society
Attn: Allie Murphy, Fund Developer
3639 26 Street NE, Calgary, AB T1Y 5E1

Return By Email:

amurphy@calgaryseniors.org

Questions? Call Us:

403.266.6200