



A Natural Legacy



Why consider *A Natural Legacy*?

- Ensure a clean and healthy environment for future generations
- Protect nature
- Provide public access to nature
- Make a commitment to the environment
- Celebrate shared goals

Join *A Natural Legacy* club

Like the mighty bur oak that has been standing in Blair Flats for more than 250 years, with new generations of species growing around it, your legacy will stand tall and ensure *rare*'s lands remain intact in perpetuity for future generations — promoting healthy water, soil, air and the diversity of plants and animals that are paramount for human well-being and ongoing economic stability.

Let us know that you've included *rare* in your estate plans and we will acknowledge you in our recognition and keep you informed of special information sessions.

About *rare*

“There is no other organisation like this in Canada. Some organisations fund research, some own property for conservation and related purposes, some focus on education about the environment. *rare* does all of this and does it in an important context, i.e., an urbanising region where the threat to ecological structures and functions are greatest, the need for ecological restoration the largest, and the need for urbanites to have a place to go to both enjoy nature and understand the value of ecological research the most important.”

Stephen Murphy, rare Environmental Advisory Committee; Professor and Associate Chair, Undergraduate Studies, Environmental and Resource Studies, University of Waterloo

The Grand River watershed is the largest watershed in southern Ontario, feeding into Lake Erie. Within this watershed, *rare* is comprised of 24 different habitat types.

The forests, wetlands, grass prairie fields, cold-water streams, alvars and other ecosystems of *rare* form a beautiful landscape, also culturally significant for its history of European settlement.

Trees more than 250 years old support a rich biodiversity reminiscent of the original biota of southern Ontario prior to extensive settler land use. The reserve is home to an incredible array of flora and fauna, with species that are ranked ‘significant’ or ‘at risk’ regionally, provincially, nationally and even globally.



Photo by D. Crowell

CONTACT:

Christine Thompson, Major Gifts Manager, would be pleased to have a confidential discussion on your legacy giving goals.

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For your advisors:
rare Charitable Research Reserve
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Charitable number 87761 5914 RR001



Consider this:

Everyone knows how important Central Park is to New York City; *rare* is more than 100 acres larger. As a land trust, *rare* is growing to create green corridors and other larger green spaces in Waterloo Region/Wellington.

Anyone can leave a legacy to the environment

There are many options for including *rare* in your estate planning, creating a long-term investment in our mutual goal of ensuring the *rare* lands are preserved intact in perpetuity for our future generations to enjoy.

**The information provided is general in nature and is not intended to be a substitute for professional legal or financial advice. Donors planning a significant gift are encouraged by *rare* to seek independent legal and/or financial advice.*

Bequests by Will

In addition to remembering your family members and friends, you can also name *rare* as a direct beneficiary of specific assets, a portion of your estate or the residue of your estate. It can also result in significant tax benefits to your estate.

Gifts of Life Insurance

A new or existing life insurance policy donated to *rare* allows you to make a substantial future contribution with a relatively low monthly or yearly payment.

Charitable Gift Annuities and Charitable Remainder Trusts

These options allow you to receive a regular income during your lifetime from your donation.

Gifts of Stock, Securities (mutual funds) or Other Capital Property

Donating stocks, securities or mutual funds directly to *rare* is a more cost effective way of giving than selling the stock and making a cash donation.

RRSP/RIFFs

Donors enrolled in an RRSP, or who have already converted their RRSP to a RIFF, can designate *rare* as a named beneficiary for all or a portion of any retirement funds remaining at death.

DID YOU KNOW...

...you can make gifts of stock and/or appreciated securities to *rare*?

Making a gift of publicly traded securities, mutual funds or stocks is not only easier than you think, it can also allow you to make a larger gift to support the research, conservation and education programs at *rare* than you may have thought possible.

EXAMPLE:

Judy decides to support *rare* with a gift of \$10,000. When reviewing whether she should sell her shares in a publicly listed corporation and then donate the cash proceeds or donate the shares directly, Judy learns that she would have a greater net tax benefit by donating the shares directly to *rare*. The chart below assumes a tax rate of 50 per cent.

	Sell shares and donate the gross proceeds	Donate shares directly
Market value of security	\$10,000	\$10,000
Cost base	\$5,000	\$5,000
Capital gain	\$5,000	\$5,000
Taxable capital gain (50%)	\$2,500	\$0
Tax due on gain at 46%	\$1,150	\$0
Tax receipt for gift	\$10,000	\$10,000
Value of tax receipt at 46%	\$4,600	\$4,600
Net tax savings	\$3,450	\$4,600

Example uses Ontario federal and provincial combined tax rate.

Gifts of stock or securities donated around the end-of-year holidays must be received by our broker on or before December 14 in order to ensure that the transaction can be completed before the December 31 deadline. You will receive a charitable tax receipt for the closing price of the shares on the day we receive them.

OUR MISSION

Through the combined efforts of the community, *rare*'s team of staff and advisors and local Indigenous Peoples, we will discover the most inclusive practices and answers to environmental issues, stewarding the reserve's diverse network of natural landscapes for ecological integrity and future generations.

OUR VISION

To offer the community, including local Indigenous Peoples, the international community and future generations, a diverse network of connected natural areas, protected intact in perpetuity. As an international leader in conservation, research, restoration and education, *rare* will serve as a model system that not only demonstrates the link between ecological integrity and economic sustainability, but includes meaningful reconciliation with Indigenous Peoples, both of which are critical for the enhancement and quality of life of the planet.