



Your USask Legacy: Create a future full of possibility

BE WHAT THE WORLD NEEDS



UNIVERSITY OF
SASKATCHEWAN

Why make a legacy gift?

Your legacy gift can shape the future of USask by helping a student become the first in their family to attend university, supporting groundbreaking research that changes lives, or strengthening programs that prepare tomorrow's leaders.

Celebrate what matters most to you

Honour your personal story, your family, or lifelong passions by giving back in a meaningful way. This is a deeply personal way to share your values and express what matters most to you.

Make a bigger impact than you imagined

Legacy giving is for everyone. You can leave a contribution through a gift in your will or by naming USask as a beneficiary of an asset, amplifying your impact without affecting your current financial security. A future gift, no matter the size, has a profound and lasting effect.

Support your loved ones and your community

Many donors value the ability to care for their family and contribute to a cause that reflects their deepest values. Legacy giving allows you to honour both your loved ones and the impact you want to make.

A flexible way to give

A legacy gift can be as simple as adding a clause to your will or naming a charity as a beneficiary of an asset. Whether you're just starting to think about your legacy or revisiting your existing arrangements, your gift can be tailored to reflect your vision, with the freedom to update your plans at any time.

Maximize tax benefits

Legacy gifts can reduce the tax on your estate while maximizing the impact of your giving, allowing you to do more for the people and causes you care about.



The University of Saskatchewan advises donors to discuss their charitable giving plans with their professional advisors and family. Your legal or professional advisor can provide you with legal, estate, or tax planning advice for your personal situation. This guide is intended to help you think about how a legacy gift to USask can reflect what matters most to you.



Gift in will

A gift in your will is a meaningful way for you to support USask and the people and programs that matter most to you. Your gift can support students, research and discovery, programs, schools and colleges, libraries, athletics, or areas of greatest need. It's a way to share your values, make a lasting difference, and stay connected to the university for generations to come.

You can choose to leave a specific amount, a percentage of your estate, the residue of your estate, or a percentage of the residue. You may also choose whether your gift is endowed or non-endowed. An endowed gift provides ongoing support over time. A non-endowed gift is used to support current needs and opportunities.

We are here to listen, to understand what matters most to you, and to help ensure your wishes are clearly reflected. We invite you to connect with us for a conversation about the legacy you hope to create through USask.

SAMPLE WILL LANGUAGE

These examples are provided to show how your intentions may be expressed. We can help determine wording that reflects your wishes for you to share with your legal advisor.

Undesignated, University of Saskatchewan

I give and bequeath **the rest and residue** or **share of the residue** or **the sum of \$XX** to the University of Saskatchewan at Saskatoon, Saskatchewan, charitable registration number 11927 9313 RR0001.

Student Award, creation of an award

I give and bequeath **the rest and residue** or **share of the residue** or **the sum of \$XX** to the University of Saskatchewan at Saskatoon, Saskatchewan, charitable registration number 11927 9313 RR0001, for the purpose of creating the **[Insert Name of Award, if desired]** at the **[Insert Department/School/College Name]**. [Include any specific instructions for the award eligibility or purpose, e.g., undergraduate or graduate students, financial need (bursary) or academic achievement (scholarship) or combination].

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SAMPLE WILL LANGUAGE CONTINUED

Department/College, greatest need or purpose

I give and bequeath **the rest and residue** or **share of the residue** or **the sum of \$XX** to the University of Saskatchewan at Saskatoon, Saskatchewan, charitable registration number 11927 9313 RR0001, for the purpose of supporting **[Insert Purpose, e.g. student awards, research, programs, greatest need]** as determined by the Dean, **[Insert Department/School/ College Name]** at the time the gift is realized.

Established award or fund, includes alternate direction

I give and bequeath **the rest and residue** or **share of the residue** or **the sum of \$XX** to the University of Saskatchewan at Saskatoon, Saskatchewan, charitable registration number 11927 9313 RR0001, for the purpose of supporting the **[Insert Award, Fund Name]**. In the event the fund is not in existence, the gift is to be used to for the purpose of supporting **[Insert Purpose]**.



“This gift is my way of saying thank you and helping others find their path.”

**Louise Greenberg (D.Phil’86),
USask legacy donor**

Life insurance

A gift of life insurance can be a meaningful way for you to create a future legacy at USask, often using something you already have in place. Depending on how you choose to give, a life insurance gift may offer charitable benefits either during your lifetime or through your estate. What works best depends on your personal circumstances and intentions. We are here to listen, to understand what matters most to you, and to help ensure your wishes are clearly reflected.

GIFT OF LIFE INSURANCE

There are three ways to make a gift of life insurance:

- 1. Transfer ownership of an existing policy** to USask and name the university as the beneficiary. The university will issue a charitable receipt to you for the policy's cash surrender value, or potentially a higher Fair Market Value. You will receive a charitable receipt for ongoing premium payments.
- 2. Purchase a new policy** and designate USask as the owner and beneficiary. You will receive charitable receipts for the full amount of the premiums you pay.
- 3. Name USask as a beneficiary** of either a new or existing policy. Your estate will receive a charitable receipt for the value of the proceeds the university receives. Donor may update beneficiary at any time.

Contact us to create a gift agreement to share your intentions for the direction of the gift. Notify your executor or estate trustees if you have made USask owner and beneficiary of a gift of life insurance; we will need their support to transfer your gift.



"I ran for the U of S track team for two years and was grateful that they accepted me unconditionally. Not only did we train hard, we also had a great deal of fun doing it. Running gave me much joy, and I want other U of S track and field athletes to feel the same joy that I did back in the day."

**Don Anderson (BSPT'86),
USask legacy donor**



Registered financial assets

A gift of registered financial assets like RRSP, RRIF, and TFSA, is a meaningful way to support USask using savings you have built over time. By naming USask as a beneficiary, you can create a lasting impact on the initiatives that matter most to you, while keeping full access to your assets during your lifetime. Your donation transfers to the university tax free and a charitable receipt will be issued. We invite you to connect with us for a conversation about the legacy you hope to create through USask.

GIFT BY BENEFICIARY DESIGNATION

There are three steps to make a gift by beneficiary designation:

1. **Request a Change of Beneficiary** form from the firm that holds your assets.
2. **Complete the form** using USask's legal name, the University of Saskatchewan at Saskatoon, Saskatchewan and charitable registration no. 11927 9313 RR0001.
3. **Contact us to draft a Letter of Intent** to share your intentions for the direction of your gift.



“What is my motivation for setting up this bursary fund for future students at the University of Saskatchewan? Scholarships made available through the U of S, as well as other community organizations, helped to make it possible for me to continue my studies.”

**Elaine Wagner (BEd'69),
USask legacy donor**



Securities

A gift of publicly traded securities is one of the most tax-efficient ways to support USask. When you transfer ownership of the securities directly to the university, rather than selling the securities and donating the proceeds, you will not pay tax on the capital gains realized on those securities.

GIFT OF SECURITIES

How to make a gift of securities:

You can donate securities electronically or by re-registering the securities in the university's name and providing us with a stock certificate. To facilitate a transfer of securities, please complete the Request for Transfer of Securities form and provide a copy to both the University of Saskatchewan and your financial planner. A copy of the form can be found at give.usask.ca.

Once received, the securities are sold as soon as possible. Your charitable receipt will be based on fair market value on the day ownership is transferred.

GIFT OF SECURITIES IN YOUR WILL

Your investment portfolio may change over time and you may no longer own a particular asset at the time your gift is realized. Instead consider specifying the amount or percentage you wish to donate to USask and empower your executor to choose which assets will fund the gift, rather than naming specific securities in your will.



Greystone Circle

USask is pleased to recognize those who have included the university in their legacy plans through membership in the Greystone Circle. This circle honours individuals who have chosen to make a future gift in support of USask. Membership involves no dues or obligations. It is simply our way of saying thank you.

Real estate

Real estate can be one of the most impactful ways to support USask. Whether it's a private residence, land, or other property, a gift of real estate can create a lasting legacy.

GIFT OF REAL ESTATE

You understand that land and property represent stewardship, responsibility, and a deep connection to place. When you choose to leave property to USask, you create a lasting legacy that supports students, research, and discovery for generations. Your gift helps strengthen a university that serves Saskatchewan, Canada, and the world, while ensuring the values you care about continue to make a difference well into the future.

At USask, we approach land and real estate with care, accountability, and foresight. Decisions are guided by principled planning, long-term vision, and respect for community, environment, and history. You can be confident that your legacy will be managed responsibly and purposefully, in a way that honours your intentions. We invite you to connect with us for a confidential conversation about how your gift can reflect your values and create enduring impact.



A land donation of 2,240 acres from the Estate of Joan Snyder will provide learning opportunities for generations to come.



“We are immensely grateful for Joan Snyder’s foresight and generosity. The legacy of her land gift will enhance our research and teaching for generations to come.”

**Dr. Angela Bedard-Haughn (PhD),
dean of the College of Agriculture
and Bioresources**

Donor-advised funds and foundations

If you've established a donor-advised fund or private foundation and USask is a beneficiary, please consider advising us so we can properly thank you for your generosity.

We are here to work with you and your advisors to ensure your gift is directed to an area you care about most.

Ways to get started

Share your vision with those closest to you

Imagine the kind of change you would like to see in the world and how you want to be a part of making it happen. Sharing your ideas with those close to you can be a powerful way to spark meaningful conversations.

Speak with your advisors

Consult your professional advisors to explore the best giving options for your situation. Your advisors can help you create a plan that aligns with your goals and maximizes your impact.

Connect with our team

Whether you are just starting to think about it or ready to take the next step, we are here to guide you confidentially and with care. Our Legacy Giving team can answer your questions and work with you and your advisors to ensure your gift is directed to an area that matters most to you.



Questions? We're here to help



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