

THE DR. FREDERICK W. P. JONES SOCIETY

Leaving a Bequest to Ivey

Leaving a bequest through your Will is one of the easiest ways you can make a substantial gift to Ivey, while also achieving your philanthropic and financial goals. A gift in your Will won't diminish your assets today and can result in tax relief for your estate, potentially leaving more residue for your family and other interests. When realized, your gift will help Ivey stay on the leading edge and maintain its standard of excellence for years to come.

The following information may be helpful when planning a bequest to Ivey:

Legal Name

The Richard Ivey School of Business at The University of Western Ontario

Mailing Address

Advancement Department
Ivey Business School
1255 Western Road
London, ON N6G 0N1

Charitable Registration Numbers

Canada: 10816 2587 RR0001
USA: EIN 13-6620923

Sample Bequest Wording

"I give and bequeath _____% of the residue of my estate OR the sum of \$_____ to THE IVEY BUSINESS SCHOOL AT THE UNIVERSITY OF WESTERN ONTARIO to be expended and used in support of its highest priority needs. The receipt of the treasurer or other officer of this organization shall be a sufficient discharge to my trustees."

Ivey's needs may change significantly from year to year as we respond to the rapidly changing business and education environments. Undesignated gifts help us respond to these changes most effectively. If you wish to direct your support to a specific area of the School, please contact Justin Pilon to discuss the opportunities available and ensure your intentions can be honoured.

Thank you for considering a bequest to Ivey as part of your estate plans. For more information, please contact:

Justin Pilon

Associate Director, Major Gifts
t. 519.661.4161
e. jpilon@ivey.ca
www.ivey.ca/legacies

The information contained here is general in nature and is not intended to represent legal or tax advice. It is recommended that you consult your own tax and legal advisor(s) before arranging a planned gift.