

# 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](mailto:jpilon@ivey.ca)  
[www.ivey.ca/legacies](http://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.