



Plan your Future. Inspire Ours.

Leaving your legacy with the Calgary Public Library

Legacy Giving Guide
Calgary Public Library Foundation



Photo: George Webber

A LIBRARY FOR THE FUTURE

Public libraries are magical in what they provide for the community. Libraries prepare children for success in school, welcome newcomers, create community and foster life-long learning.

Calgary Public Library is committed to creating spaces where everyone can realize their potential. From the millions of annual visits to our world-class locations to our ever-expanding online experience that brings the Library into your home, we are always finding new ways to serve the needs of Calgarians of all ages and backgrounds.

Since 1912, the Library has adapted to support the needs of our community. As we look forward, we will continue to evolve to provide solutions for challenges we cannot imagine today. With a focus on innovation, reducing barriers and building healthy and resilient communities, the Library is preparing to meet the unknown and create impact for generations to come.

After taking care of your family and loved ones, please consider a gift for Calgary through the Library. By providing the Calgary Public Library Foundation with a legacy gift, you become a member of the Epilogue Society, a group of forward-thinking donors building the Library of the future. You will provide the Library with a critical source of long-term funding — supporting generations of Calgarians.

Thank you for your consideration and helping us to build a stronger Calgary and a brighter future.



[**epilogue society**]
*Plan your future.
Inspire ours.*



Photo: Rob McMorris

**Who sparked
your love
of reading?**





Photo: Rob McMorris

BUILDING A STRONGER COMMUNITY



Maureen Proctor has been a volunteer with the Calgary Public Library for two decades.

When she visits the Library, she sees an organization at the forefront of technology, providing equal access to

the tools and resources that Calgarians need.

“I plan to continue volunteering as long as I can, but I know I won’t be able to be there forever. I want the children I volunteer with to have a Library that they can turn to for countless opportunities,” Maureen explains. “This is why I decided to make a gift to the Calgary Public Library Foundation in my will.”

“The Calgary Public Library uplifts the entire population. Our community is stronger when we have the resources to help ourselves and our neighbours.”

“I found comfort knowing that my passions and values were being represented in my will.”
—Maureen



HONOURING AN ENDURING COMMITMENT



Becky Lathrop was a force for good in the world. A life-long lover of books, Becky worked at the Calgary Public Library and later became one of its first volunteers.

For more than 40 years, Becky donated her time to the Homebound Readers program, which changes lives by providing materials to those who are unable to visit the Library.

To celebrate her 90th birthday, Becky's family established the Becky Lathrop Fund for Homebound Readers. Each family member contributed to the fund in her honour, and when Becky passed away in 2016, the family requested donations to the fund in lieu of flowers.

Becky was unflappable, warm, and supportive. The Becky Lathrop Fund for Homebound Readers will honour her legacy for years to come.

*A park bench
at the Giuffre
Family Library
has been named
in Becky's
honour.*



INSPIRING FUTURE GENERATIONS



After finding success within the tech start-up world, Conrad Whelan wanted to begin his philanthropic journey by giving back to a city that has given him so much.

He remembers his parents taking him and his sister for visits to the Library, instilling in both of them a love of reading from a young age. Conrad is now an advocate of life-long learning, and recognizes just how much a child can benefit from the early learning and literacy support provided by the Library. He chose to make a legacy gift to the Library to ensure that future generations of children can access the same support that he did.

“It means so much to be able to give back in such a memorable way to the city that raised me. I have many memories of my mother dropping me off at the Library where I’d read endless amounts of books and comics about travel and adventure. Those memories have now shaped me into the adventurer that I am today.”

“I chose to give to the Library because I believe libraries are such an essential element in the development of civic spaces, cultures and cities.”

— Conrad



Photo: Rob McMorris

A man with glasses and a dark jacket is seen in profile, looking out of a large glass window. The window reflects the interior of the building and shows a blurred view of a city street at dusk or dawn. The street has cars with their headlights on, and a red traffic light is visible in the distance. The overall mood is contemplative and serene.

How will
you leave
your legacy?



A GIFT THAT KEEPS GIVING

The Library inspires a love of learning.

Whether you have fond memories of signing your name to a library card for the first time as a child, found community as someone new to the city or country, used the Library's resources to help make your dream career a reality, or contributed as a volunteer, the Library is a place for all.

Help us shape the future of the Calgary Public Library.

While estate planning may be uncomfortable to think about, many of our donors have shared that they found comfort knowing that their values were being represented in their wills. After taking care of your family and loved ones, a legacy gift will create a lasting impact for your community without affecting your current standard of living. Leaving a charitable legacy gift in your will also provides estate tax benefits.

Your legacy gift will ensure that Library programs and services continue to support and nurture generations of Calgarians, regardless of what the future holds.

TYPES OF LEGACY GIFTS

Your legacy gift has the potential to impact generations of Calgarians. When considering this type of gift, we strongly encourage you to seek independent legal and/or financial planning advice.

BEQUESTS

A charitable bequest is a gift to the Calgary Public Library Foundation made in your will. A bequest can take the form of cash, securities, assets, and the donation of all, or residue of an estate. By naming the Calgary Public Library Foundation to receive a gift in your will, your estate will generate tax credits that may offset any taxes payable.

PUBLICLY LISTED SECURITIES

Gifts of marketable stock and securities are transferable through your broker or financial advisor. The Calgary Public Library Foundation can provide a form with all pertinent information to your broker or advisor, and all donated securities are sold upon receipt. You will receive a tax receipt for the value of the securities donated based on the closing price on the day of receipt by our custodial agent.

LIFE INSURANCE

Life insurance can be an excellent vehicle for a legacy gift, as charitable donations can be made through an existing or new life insurance policy. You can designate the Calgary Public Library Foundation as the owner and irrevocable beneficiary, or donate a policy through your will by naming the Library Foundation as the beneficiary.



RRSP/RRIF

By naming the Calgary Public Library Foundation as the beneficiary of your RRSP or RRIF, either during your lifetime or in your will, you will support the Library and the hundreds of thousands of members who use its services annually. There are significant tax advantages to this type of gift that you can explore with your advisor.

DESIGNATING YOUR GIFT

You can choose how to designate your legacy gift to ensure that its impact represents your values and how you wish for your story to be remembered. We would be pleased to discuss details of the following gift designation opportunities with you.

EPILOGUE FUND

This fund ensures that the highest priority needs of the Library are met in a timely manner, no matter what the future holds.

BROAD AREAS OF NEED

You can support a broad area of the Library's work that is meaningful to you. Examples of such areas include providing funding for Collections, including books, magazines and eBooks, or supporting Early Learning, expanding quality educational resources for the Library's youngest members.

ENDOWMENT FUND

Contribute to an existing or establish a new endowment fund that continues in perpetuity. Your gift will generate annual income to support the Library while maintaining the fund principal. Endowed gifts support either the highest priority needs of the Library or a specific purpose.



THE EPILOGUE SOCIETY

When you make the generous decision to leave a gift in your will to the Calgary Public Library Foundation, you also become a member of our exclusive Epilogue Society.

When selecting a name, we were guided by what has been shared by many of our donors when making the decision to leave a gift in their wills; the importance of building the future, and of directing how they want their stories to be remembered. Leaving a legacy gift is itself a type of epilogue, setting the stage for the future and preparing the community for what is to come.

These forward-thinking donors provide a critical source of long-term funding for the Library, ensuring that the Library's free resources, programs and services can meet growing and changing community needs far into the future.

We will work closely with you to develop a customized plan about how to best honour your generosity and recognize your wishes for the future.



**How will
your story be
remembered?**





DOING MORE WITH YOUR SUPPORT

The Calgary Public Library Foundation empowers people to make a difference in their community. All donations cultivate innovation and bring the Library to those who need it most.

Each year, Calgarians borrow millions of books and participate in thousands of free and accessible programs in-person and online. Donors like you have helped to remove the annual membership fee and supported the Library's move to a fine-free model.

Donations remove barriers to access, ensure that Calgarians continue to find world-class resources and services at the Library, and reflect the innovative and resilient spirit of our city.

Your legacy gift ensures the Library has long-term, stable funding to plan for and secure the future. Thank you.

Your story will impact Calgary for generations to come.



CALGARY
PUBLIC LIBRARY
FOUNDATION

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