Professional Partners
Estate & Planned Giving

Professional Partner Commitment Form

Name____

Company_____________________________________

Address______________________________________

City ____

Postal Code____________Tel ____________________

Email ____

- ☐ Yes, I would like to become a TRU Foundation Professional Partner
- ☐ I would like more information on personal giving and recognition opportunities at the TRU Foundation

Signed,

Name_______________________Date______________

Please return to:

Thompson Rivers University Foundation

900 McGill Road
Kamloops, BC V2C 0C8

Fax: 250.828.5265
Email: kgamracy@tru.ca

tru.ca/foundation

Thompson Rivers University

Thompson Rivers University
Foundation

Professional Partners
Estate & Planned Giving

For more information and to speak to someone personally and confidentially about Planned Giving, please contact:

Karen Gamracy
Director, Advancement
TRU Foundation

250.828.5264
kgamracy@tru.ca

900 McGill Road
Kamloops, BC V2C 0C8

MC118013

Information for Financial and Legal Advisors

Financial and Legal advisors play an important role in the estate planning for their clients, many of whom have an interest in supporting charitable causes such as education.

There are many ways to make a gift that will develop the leaders of tomorrow by supporting post secondary education. The type of gift your client makes will depend on his or her personal circumstances. The TRU Foundation has information sheets on bequests, life insurance gifts, gifts of securities, and donating RRSPs that you can share with your clients to make it easier to explain the many options available.

Why discuss philanthropy with your clients?

Many of your clients are searching for an effective way to give back to their community, to memorialize a loved one and to make a difference in someone's life. You can help them achieve these results and get personal satisfaction from doing so.

Discussing philanthropy and planned giving with people can be a sensitive issue and needs to be done in a way that respects their privacy, values and autonomy. As a financial and legal professional you are the best person to initiate and engage your client in these conversations.

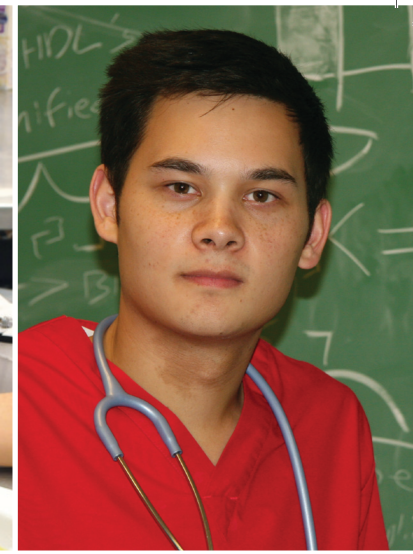
Your efforts will help Thompson Rivers University continue to grow and meet the important education, cultural and economic needs in our community both now and in the future.

Talking About Charitable Giving

Many clients want their professional advisors to help them plan charitable giving. The TRU Foundation can work with you to answer questions and help each client fulfill their charitable goals[1]

- What are your client's personal motivations for charitable giving?
- What are your client's charitable interests in the community?
- What are your client's priorities when focusing on a few areas that may have the greatest impact?
- What level of involvement does your client want to have in identifying charitable uses for their gift?
- What type of giving instrument best fits your client's financial situation and tax status?



The TRU Foundation Professional Partner Program

The Foundation is offering advisors an opportunity to be part of our Professional Partner program. We will provide you with charitable estate planning information including:

- Printed gift vehicle sheets on:
  - Making gifts in a will – Bequests
  - Gifts of Securities
  - Gifts of Life Insurance
  - Donating RRSPs and RRIFs
- Information on designation of gifts to TRU: Student Assistance, Infrastructure and Research Initiatives.
- Staff knowledgeable about planned giving options and charitable tax receipting for income tax purposes.
- A comprehensive website with a section dedicated to Planned Giving and information for advisors (currently under construction).

Recognition for Professional Partners

Advisors that choose to become part of our program will receive:

- Recognition on the TRU Foundation website.
- Recognition in the TRU Bridges magazine which is mailed to approximately 22,000 alumni, donors and sponsors.
- Invitations to Foundation events.
- A recognition certificate to display in your office.

About TRU

Thompson Rivers University is the largest British Columbia university outside of the lower mainland, serving nearly 25,000 learners annually, on campus and online.

TRU is a university of unique attributes and opportunities. It is a place where those with a will to advance their educational standing are welcomed and supported in pursuit of their goals, where non-traditional learners can flourish, where internationalism is a daily reality in classes across all faculties, and where a combination of excellent teaching and community-inspired research adds up to a one-of-a-kind educational journey.

TRU is committed to providing access to excellent learning, research and scholarly activities for the benefit of people locally and globally. At TRU, students can choose from a wide range of credential levels, including certificates, diplomas and bachelor and master's degrees. Programs are offered in diverse areas of study from the Trades to Law, Business to traditional academic paths in the Arts, Science, Education and Social and Health Sciences. Through TRU Open Learning, learners across the province and the country meet their varied educational objectives through distance learning.

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1 *Community Foundations of Canada*
www.cfc-fcc.ca/pa-eresource/index.cfm