

PLANNED GIVING

The smartest investment you might ever make

WHY INVEST IN CONCORDIA?

As Canada's next-generation university, we are focused on solving challenges that will impact us all. In an age of disruptive technological and social change, we're providing a model for how universities can best serve society. At Concordia, our 48,000 students and 7,000 faculty and staff find a place grounded in the needs of tomorrow.

SMART IMPACT GIVING

Planned gifts provide creative and flexible strategies to pursue your charitable and financial goals.

PLANNED GIFTS INCLUDE:

- **Bequests:** Through your will, you may specify an amount, RRSP, RRIF or pension that you would like to leave to Concordia.
- **Publicly listed securities:** Gifting your shares, bonds or mutual funds to Concordia exempts you from capital gains taxes and you receive a donation receipt equivalent to the entire value of the securities.
- **Life insurance:** You can name Concordia as the beneficiary to a life insurance policy or assign ownership of a new or existing policy to Concordia.
- **Charitable remainder trust:** Contributions of cash or property to establish a trust can protect assets, provide immediate tax relief, minimize future probate fees and protect against potential challenges to your will.
- **Flow-through shares:** If your financial planner or tax advisor has mentioned this tax shelter, you may consider using it to make a significant donation at a relatively low cost.
- **Stock options:** Donating shares resulting from the exercise of stock options can be a convenient and cost-effective way to give for executives.
- **Charitable gift annuities:** This vehicle allows you to make a significant contribution while guaranteeing steady retirement income.



WHY PLANNED GIFTS ARE INCREASING

- You gain the satisfaction of providing for Concordia and can designate the gift to any area of your choosing
- You amplify the power of your giving and your impact
- Your family and loved ones remain provided for
- You help ensure your lifetime security
- You gain immediate tax relief and/or your estate does in the future
- Monies that might otherwise go to taxes are directed to a cause that is dear to you

WHY CONCORDIA?

Our unique environment for learning and research. Concordia's academic goals are grounded in an ethos of dynamism and social responsibility. This remarkable environment was created in 1974, after merging two proud Montreal traditions — the classic liberal arts education offered by Loyola College and the practical educational opportunities offered to wide audiences by Sir George Williams University.

Today, Concordia is an open and engaged university that encourages its 48,000 students to become active, critical and concerned citizens. Our approach has made us the top-ranking university under 50 in North America, as well as one of the world's 200 most international universities.

Our commitment to society. Concordia is leading the way to a new kind of university, one that makes higher education accessible. The university shares its ideas through free and open access to scientific findings and seeks ways to make social and economic justice more prevalent. We offer some 500 undergraduate and graduate programs, diplomas and certificates, while maintaining formal ties with more than 100 institutions in 33 countries.

Our strong academic leadership. Concordia is proud of its impressive roster of senior faculty, many established leaders in their fields, across the Faculty of Fine Arts, Faculty of Arts and Science, Faculty of Engineering and Computer Science, John Molson School of Business and School of Graduate Studies.

Our contributions and discoveries. Every year Concordia faculty and students are recognized for their accomplishments. Whether they are Rhodes Scholars, recipients of Governor General's and Prix du Québec awards or members of the Royal Society of Canada, Concordians are among the celebrated academics in our country. Our contributions and our discoveries change lives.

Our partnership in Quebec. Concordia's value to the Quebec economy is estimated at \$2 billion annually. And this doesn't account for the contributions of our more than 211,000 alumni, 112,000 of whom reside in the university's home province.



THE CAMPAIGN FOR CONCORDIA: NEXT-GEN. NOW.

Concordia is leading its most ambitious fundraising effort ever with a goal to raise \$250 million by 2022 (concordia.ca/campaign). The Campaign for Concordia will support nine strategic directions that reinforce our position as Canada's next-generation university (concordia.ca/directions). Backed by campaign co-chairs Andrew Molson and Lino Saputo Jr, BA 89, volunteer leaders across Canada, the United States and Asia are helping to spur our thinking. To prepare for what's next, we need you. Join the Campaign for Concordia as we change education for a changing world.

CONTACT



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