



Leaving a Legacy for Learning

Thank you for your interest in leaving a gift to the Dr. Stirling McDowell Foundation for Research into Teaching Inc. Through the generosity of our donors, the Foundation can continue to strive to support research to benefit students and teachers in the province.

It is important to us that your donation is distributed according to your wishes. We have included sample language below to ensure clarity on the process.

Sample wording for leaving a gift in your will (bequest) to Dr. Stirling McDowell Foundation for Research Into Teaching Inc.

If you have decided to leave a gift to the McDowell Foundation in your will, here is wording that may help. McDowell Foundation's legal name is Dr. Stirling McDowell Foundation for Research Into Teaching Inc., and a bequest may be expressed as outlined in the sample language below.

Specific Bequest – to donate a specific amount of money or a specific asset

"I give and bequeath the sum of \$..... (or transfer assets with an equal value) to the Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada for the general purpose of supporting its research and its greatest needs."

"I give to the Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada all of my shares of [company name] to be used for the general purposes of said charity."

Contingent Bequest – to donate a gift if certain conditions are met

"I give and bequeath the sum of \$...../.....% of my estate (or transfer assets with an equal value) to the Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada for the general purpose of supporting their research and its greatest needs if [condition is met]..."

"In the event that _____, I give the Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada _____ to be used for the general purposes of said charity." [e.g., my sister does not survive me]

Residual Bequest – to donate an identified percentage/portion of what is left in your estate after taxes, debts, and other bequests are paid

"I give and bequeath the sum of % of the residue of my estate (or transfer assets with an equal value) to Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada for the general purpose of supporting their research and its greatest needs."

“I give ___% of the rest, residue, and remainder of my estate to the Dr. Stirling McDowell Foundation for Research Into Teaching Inc. at Saskatoon, Saskatchewan, Canada for its general purposes.”

Note: Rather than “for the general purposes,” the language may also state “for such purposes as the Board of Directors of said charity may from time to time determine.”

Bequests for Restricted Purposes

If you have decided to leave a legacy to the McDowell Foundation with a restricted purpose, use the above language but also describe the particular purpose, for example: *“...to be used for grants towards the preservation of Indigenous language,”* or *“...to be invested in the Foundation’s Endowment Fund.”*

If you would like to restrict bequest funds, it is recommended that you include language that allows the Foundation to use the gift for a different purpose, if circumstances change, in order to ensure your gift will still go towards the organization in a meaningful way. We recommend including the following clause to your will if you are in full agreement with the intention expressed.

“In the event that, in the opinion of the Board of Directors of the Dr. Stirling McDowell Foundation for Research Into Teaching Inc., it should become impossible, inadvisable, or impractical to apply this gift for said purpose, the gift may be used for other purposes consonant with the spirit and intention of this gift adhering as closely as possible to my stated intention.”

“In the event that unforeseen circumstances make the specified use of the bequest no longer practical or desirable, the Board of Directors of Dr. Stirling McDowell Foundation for Research Into Teaching Inc. is hereby authorized to make changes in its use while keeping as close as possible to the spirit and general intent of the bequest.”

Note: These clauses are provided to aid in your estate planning process. Please review them with your own legal and tax advisors to determine their suitability for your unique personal, financial, and tax situation. They are offered as an aid to assist in your planning with an understanding that the McDowell Foundation is not providing legal or professional advice.

Charitable Information

Legal Name: Dr. Stirling McDowell Foundation for Research Into Teaching Inc.

Charitable Registration Number: 133638734 RR0001

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