

# BEQUEST STATEMENT OF INTENT



This statement is an expression of my intent to provide for the future of the CPA Manitoba Foundation ('the Foundation') through a Bequest in my will.

Upon my passing, the Foundation will receive:

- A specific bequest providing the Foundation a specific sum of money, stated percentage of my estate, or a specific property such as real estate or securities.
- A residual bequest leaving all or a portion of my estate after providing for other beneficiaries.
- A contingency bequest ensuring that the Foundation receives all or a share of my estate in the event of the prior death of certain other beneficiaries.

The estimated value of my gift is \$ \_\_\_\_\_ .

## Purpose

It is my wish that the gift be used:

- To establish a scholarship or bursary
- For the following existing fund(s) or purpose: \_\_\_\_\_
- To create the following fund (please provide fund name and purpose): \_\_\_\_\_

Special circumstances of my gift include:

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I would like to work with the CPA Manitoba Foundation to create a memorandum of understanding that details the purpose of my gift.  Yes  No

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## Recognition

We appreciate the opportunity to acknowledge your commitment to the Foundation by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

- I permit the CPA Manitoba Foundation to use my name in printed or electronic lists of planned gifts, which may appear in CPA Manitoba's eNEWS, the Foundation's web site and/or other publications.
- I prefer to remain anonymous during my lifetime. You may recognize my gift after you receive it.
- I prefer to remain anonymous during and after my lifetime.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Phone \_\_\_\_\_ (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell) \_\_\_\_\_

Email \_\_\_\_\_

Thank you for your support of the CPA Manitoba Foundation. It is our current and future donors that will ensure business and accounting educational needs are met. If you have any questions, please contact 204 943.1538 or [foundation@cpamb.ca](mailto:foundation@cpamb.ca).