

Letter of Direction – Estate Bequest

A) Name:

First	Last	Joint First Name:	Joint Last Name:
Street Address:		City:	Province: Postal Code:
Phone:	Email:	Email 2:	

To the Board of Directors of Christian Stewardship Services, 133 Church St. N., Cambridge, Ontario N3H 1V8

Dear Christian Friends, I/We have, in my/our last will(s) and testament, or through naming a direct beneficiary on my/our registered investments or insurance or other tool, included a gift for Christian Stewardship Services, I/we would like to have this gift distributed as follows:

Charity Name, Address and Charitable Number (if known).

Disclose your name to Charity?

_____ % to Charity Name: _____ Now Upon Death Anonymous

Address: _____ Charitable # _____

Designation (if any) _____

_____ % to Charity Name: _____ Now Upon Death Anonymous

Address: _____ Charitable # _____

Designation (if any) _____

_____ % to Charity Name: _____ Now Upon Death Anonymous

Address: _____ Charitable # _____

Designation (if any) _____

_____ % to Charity Name: _____ Now Upon Death Anonymous

Address: _____ Charitable # _____

Designation (if any) _____

_____ % to Charity Name: _____ Now Upon Death Anonymous

Address: _____ Charitable # _____

Designation (if any) _____

Initials ____/____

Letter of Direction – Estate Bequest (Continued).

Charity Name, Address and Charitable Number (if known).

Disclose your name to Charity?

Now Upon Death Anonymous

_____ % to Charity Name: _____
Address: _____ Charitable # _____
Designation (if any) _____

Now Upon Death Anonymous

_____ % to Charity Name: _____
Address: _____ Charitable # _____
Designation (if any) _____

Now Upon Death Anonymous

_____ % to Charity Name: _____
Address: _____ Charitable # _____
Designation (if any) _____

Now Upon Death Anonymous

_____ % to Charity Name: _____
Address: _____ Charitable # _____
Designation (if any) _____

Now Upon Death Anonymous

_____ % to Charity Name: _____
Address: _____ Charitable # _____
Designation (if any) _____

_____ % This Letter of Direction is a two-page form and must add up to be 100 percent in total.

Please note that ChristianStewardship Services may only distribute gifts to registered Canadian charities

These gifts are to be used by the charities as desired in their own charitable work, unless otherwise noted.

If one or more charities no longer exist at the time of distribution of our gift, I/we request the Board of CSS to:

- Make the gift to a charitable organization that, in the opinion of the Board, most closely resembles my/our choice.
- Distribute that charity's share proportionately amongst the other charities listed above.

I/We understand that the current CSS policy is to distribute 100% of this gift to partner and associate partner charities; CSS withholds 3% of the gift portion to non-partner charities (maximum of \$1,000 for each non-partner, capped at an overall maximum of \$4,000 for the entire distribution). This cost sharing helps CSS provide these services.

Sincerely,

Signed this _____ day of _____, 20_____.

Signature

Name: _____

Joint Signature (if required)

Name: _____

Questions about Filling out the CSS Letter of Direction

1. Who should write a Letter of Direction?
 - a. Anyone who has made (or intends to make) a will that provides a gift to charity through Christian Stewardship Services. If the Letter of Direction represents the wishes of a husband and wife, both parties should sign.
 - b. If you are making a gift of appreciated securities, an annuity, a RRSP (or RRIF) or a CSS Revocable Deposit Agreement, you can also use the Letter of Direction to indicate which charities you want to support.
2. Which charities can I include?
 - a. Any registered Canadian charity, including Foundations.
 - b. Any foreign educational institution that has been registered on Schedule VIII of Canada's Income Tax Act. Calvin College, Calvin Seminary and Dordt College are included in this list.
3. Why can't I include non-registered charities or foreign charities?

Canada Revenue Agency does not allow CSS (or any other charity or church) to distribute money to any party other than registered Canadian charities (and the exceptions listed above). If you need more help with this, please call the CSS Head Office at 1-800-267-8890.
4. What if a charity I have chosen no longer exists when the gift is to be made?

You can choose to have your gift redistributed amongst the other charities you are supporting OR have CSS Board of Directors find a charity with a similar mission. If appropriate, CSS may consult with your Executors.
5. How do I calculate the percentage to each charity?

Since CSS will distribute your entire gift to charity in accordance with those percentages, the numbers must add up to 100%.
6. Why does CSS charge a fee to send gifts to non-partners?

By paying annual partnership fees to CSS, the CSS partners make it possible for CSS to exist. By deducting distributions fees from gifts to non-partners, those non-partners also support the services that CSS provides.
7. How do I change the charities I want to support?

Simply fill out, date and sign a new Letter of Direction and send it to CSS.
8. Who looks after these Letters of Direction?

They are filed confidentially at our Head Office. They are also scanned and stored electronically as a secure backup.
9. Why should our names be shared?

It is helpful and encouraging to our partners and other charities to know who their supporters are. Please be sure to fill out one of the choices so that CSS can record your wishes.
10. Should I give a copy to my lawyer?

Your lawyer does not need a copy. However, you may want to keep a copy of your signed Letter of Direction with your will for yourself and your executor.