



**MARKETING – Life Insurance Enquiry Response Letter –
Modify to your style and tone.**

Dear

Thank you for your generous support of our efforts to create (Insert Your Organization's Reason for Being HERE). You have helped us accomplish so much. And we're excited about working to bring even more hope for the future. We all know that we cannot predict the future. Yet with thoughtful planning, a passionate vision, and donor support, we at (Insert Your Organization's Name HERE) we can achieve our vision and mission.

With our vision in mind, we have developed a special program for our donors. It is a donation program that is future-based. The program is called Planned Giving. You may be wondering, 'What is planned giving?' Well, simply said, it is a gift that is made through your financial or estate plan. The paperwork for your gift is completed now, but your gift will be received at sometime in the future when you no longer require it. And, the gift is tailored to your personal and financial circumstances. Best of all, the government has allowed significant tax advantages to donors who make these types of gifts. There are many different ways to make these types of gifts, so you have lots of options.

You recently requested information on the various ways to make a lasting legacy through a gift of a Charitable Gift of Life Insurance. A **Gift of Life Insurance** is an easy and simple way to support (Insert Your Organization's Name HERE) while allowing you to make a significant gift that you might not otherwise be able to give. It is an affordable way to create a significant legacy at (Insert Your Organization's Name HERE). The modest annual premiums paid over time will result in a significant gift that will make a lasting impact. I have enclosed information sheets on the many benefits of making a charitable gift of life insurance.

Charitable giving is a personal matter and each one of us has our own unique set of circumstances. If you haven't already drawn up a Will, I urge you to do so. With the help of an estate professional, you can make sure that your family and loved ones will have the resources they will need. If you *don't* draw up your Will, you have no say in the distribution of your assets -- it's left completely up to the province in which you live. If you don't have a Will, you lose control of what happens to your assets when you die. This fact alone underlines why it is so important to take the time to prepare a Will.

Many donors do not realize that the federal government has allowed significant tax advantages to those who make charitable Will bequests. A charitable Will bequest is **one of the only ways to reduce taxes owing upon death and at the same time may increase inheritances to loved ones**. More and more people are taking advantage of these benefits after discovering the simplicity and affordability of this form of charitable giving.

If you have any questions regarding the enclosed materials, please feel free to call. I would be pleased to follow up with you once you have a chance to review the enclosed materials and answer any of your questions. Of course, there is no obligation on your part.

Again, thank you for your support and all the best.

Sincerely,

Signature

/Enclosures

Life Insurance Fact Sheet

Will Bequest Fact Sheet