

BE IMMORTAL



ROM Currelly
Legacy
Society

For more information about
the Currelly Legacy Society,
please call 416.586.5578 or
visit ROM.ca/support.

WE LIVE ON IN WHAT WE LEAVE BEHIND

ROM is Canada's leading international cultural institution, presenting, integrating and connecting the disciplines of art, culture and nature in exciting, innovative ways. For more than a century, it has shared the wonders of the past and preserved them for the future. ROM embraces the opportunity to become a 21st century museum: creative, accessible, engaged with its communities, and relevant to audiences in order to inspire and make a real difference in their lives.

Through a legacy gift, you can help ROM continue to tell important cultural and scientific stories about Canada and the world to an increasingly diverse public. It can be as simple as naming ROM as a beneficiary in your will, RRSP/RRIF, life insurance or setting up a charitable gift annuity.

Your commitment also inspires and encourages others to make a legacy gift. Just as the contributions of past donors have helped shape ROM, the impact of your support will be felt for generations to come.

A legacy gift is an opportunity to support your personal passions at the Museum. The philanthropic possibilities are as varied and vast as ROM's own vast collections. You can support the Museum's highest priorities, fund a specific program or establish a permanent endowment fund.

Your legacy can help us:

- Acquire a Canadian or international treasure
- Conserve an extraordinary painting, artifact or object
- Fund important research and scholarships
- Discover a new species
- Endow a curator, lecture, program or collection
- Share the Museum experience with the next generation of learners



JEAN'S STORY

Ask Jean Read what part of ROM she loves the most and she'll reply, "I love it all!" For more than 25 years, Jean has been an enthusiastic ambassador for ROM, first as a member of the Board of Trustees, then as a volunteer. Jean directs her annual and planned gifts to care of the collections. Over the years, she has supported conservation projects such as the restoration of the Paul Kane collection. Through a gift of retirement, Jean helps preserve the Museum's many treasures for the enjoyment and education of future generations.

Gifts of Retirement Funds

After providing for their loved ones, many people leave their retirement funds to charity. All you need to do is obtain a change of beneficiary form from your plan administrator and name ROM Foundation as beneficiary of all, or a percentage, of your retirement account. You retain full access to your retirement funds during your lifetime, and what remains will pass to ROM to support your favourite program. Because the tax credit for this gift will offset the tax on the distribution, the entire amount passes to ROM tax-free.



AMBROSE'S STORY

Ambrose Wah Hing Lo was fiercely proud of his cultural heritage and loved Chinese history, visual art, music and opera. He often visited ROM's Chinese collections to savour the serenity of the Buddhist temple wall paintings. In his memory, his partner, Neil Cochrane created the Ambrose Wah Hing Lo Endowment Fund to support the acquisition of Chinese artifacts. Ambrose's legacy will be the enjoyment these new works bring to future generations.

Endowment Funds Gifts

When you make a gift of an endowment fund—either today or in your estate plans—you ensure ROM has a steady source of income to build its diverse collections and programs. You may create a personal named fund with a gift of \$25,000 or more. ROM Governors' endowment is comprised of many individual funds, each with its own name and terms. These named endowment funds are permanent living memorials to the donors.



GWEN'S STORY

Like many moms in Toronto, Gwen Harvey brought her kids to ROM to see the dinosaurs and experience the bat cave. But she also brought them to the Museum so they could learn about different cultures. "I wanted my children to have an understanding and appreciation for other people's cultural traditions and backgrounds, and to open their eyes to a larger world outside of Toronto," she says. A long-time friend and supporter of ROM, Gwen chose to support the Museum through a gift of life insurance.

Gift of Life Insurance

A gift of life insurance is an affordable way to make a major gift to ROM and provides tax relief during your lifetime or to your estate. For example, if you designate ROM as the beneficiary of your permanent life insurance policy, your estate will receive a charitable tax receipt for the amount ROM receives. If you also make ROM the owner of your policy, you are entitled to a donation receipt for the value (if any) of the policy now and for any future premiums paid.



NANCY'S STORY

A long-time educator, Nancy Main was the founding principal of the Etobicoke School for the Arts. She vividly recalled visiting ROM as a child and later during university. It was then that she realized her desire to teach, which led to her work with ROM Saturday Morning Club. Through a gift of securities, she created the Nancy E. A. Main Fund to support ROM's educational initiatives – a cause close to her heart – and by topping up her initial donation with a generous gift in her estate, ensured its future for generations to come.

Gifts of Securities

By making a direct gift of publicly traded securities to ROM, you can achieve far greater tax savings than by donating the cash proceeds from the sale of the securities. When you make a gift of stocks, bonds, futures, options or shares in mutual funds, you pay no tax on capital gains earned. This could provide a tax saving of up to 50%. A charitable tax receipt is issued for the fair market value of the securities on the date they are transferred to ROM. To make a donation of securities, simply instruct your financial institution or broker to transfer your gift of securities electronically or via certificate form to ROM Governors.



LOUISE'S STORY

Louise Hawley Stone dedicated her life to the world of museums and is widely regarded as ROM's first volunteer. Born in Toronto, Louise moved to New York City in 1929. She said, "I became very jealous of the wonderful endowments the American museums had ... so I thought that, if I ever was back here, I would certainly try to do something about it." In 1992, she created the Louise Hawley Stone Charitable Trust for ROM, and bequeathed her fortune to the trust upon her passing. Its creation allows the Museum to compete internationally for major acquisitions and to publish books on our world-class collections.

Charitable Remainder Trust

A charitable remainder trust gives you the flexibility of making a gift of cash, securities or real estate to ROM while retaining the income these assets provide. You may continue the financial management of your assets or delegate the responsibility to ROM or another trustee. Regardless, you or another named beneficiary will still receive the investment income these assets provide for your lifetime, after which the capital becomes ROM's property. Since a charitable remainder trust is an irrevocable gift, you benefit from an immediate charitable tax receipt as calculated by an actuary.



HARRY'S STORY

Over the years, many gifts of natural history collections have enriched ROM, but J. H. 'Harry' Fleming's immense bequest was in a class by itself. In 1943, his donation was described as "the most representative private collection of birds in the world." With over 34,000 specimens, even today it makes up one quarter of ROM's ornithology collection.

J. H. Fleming was a dedicated ornithologist who devoted his life to the scholarship of natural history. His legacy contributes to our understanding of the natural world today.

Gifts in Kind

Art, books and precious artifacts can become tax-saving gifts in kind. The discussion of a gifts-in-kind starts with the submission of a photo and description of the item being considered as a donation. Based on an initial review, curatorial staff may then inspect the object. For objects valued over \$5,000, the Museum will secure two arm's length appraisals by experts and provide a tax receipt based on ROM's rigorous guidelines determining "fair market value."

LIZA'S STORY



ROM never had a better friend than Liza Samuel. She was its greatest docent, cheerleader, benefactor and advocate. “I’ve loved museums all my life,” she said. “When I was a little kid, museums were like treasure houses. They held wonderful things, all with stories to tell about the past.” Liza’s final gift of many, a bequest in her will, supported Liza’s Garden. Its innovative and bold designs were qualities that Liza championed at ROM, and it transformed an ordinary roovescape into a dramatic natural vista.

Bequest

A charitable bequest is a gift given through your will. It is a simple way to make a significant contribution to ROM while maintaining your present financial security. Your bequest may be given for the Museum’s highest priority, for a specific program, or to establish a permanent endowment fund.



MARIAN'S STORY

Dr. Marian Fowler was a celebrated biographer renowned for her intimate portraits of women of style and substance. She was inspired in particular by ROM's outstanding international collection of textiles that illustrates transformations in design and manufacturing over 3,000 years. "When I was three years old I was already a 'fashion freak,'" she says, laughing. "I think it's in your genes because my grandmother was the same way." ROM is deeply grateful for two charitable annuities donated in her lifetime, as well as a significant estate gift which will support the Museum for decades to come.

Charitable Gift Annuity

Imagine a way to make a significant gift to ROM and receive tax-favoured income for the rest of your life! With a charitable gift annuity you, or you and a loved one, will receive a regular income for life. Depending on your age, most of the annual income is tax-free. You will also receive a charitable tax receipt for 25-35% of your gift.

CURRELLELY LEGACY SOCIETY

Named for ROM's first director, Charles Currelly, and his wife, Ada, the Currelly Legacy Society offers special lectures and luncheons with curatorial staff as our way of thanking you for your future gift. We respect that your financial plans are private and that you may change your mind as your circumstances change; however, we'd love to hear that you've remembered the Museum in your estate and welcome you as a member of the Currelly Legacy Society.

“Legacy gifts are a powerful investment in ROM's mission to bring people together to shape a shared future. By committing to ROM in your estate plans, you live on in the impact you leave behind for audiences today, and for generations to come.”

—John Kearsey
President & CEO,
ROM Governors