

Learn.
Lead.
Serve.



Legacy
Circle

Planned Giving at
St. Michaels University School

Our Mission

Our school seeks the excellence in all of us, with passion and compassion. We are a community shaped by the pursuit of truth and goodness, providing outstanding preparation for life.



Our Vision

To learn, to lead, to serve.



Our Values

Respect | Courage | Honesty | Service





Your School, Your Legacy

To learn, to lead, to serve is the Vision of St. Michaels University School. It is a commitment to teach and grow alongside our students, an opportunity to use what we learn to make a difference, and a promise to give back through philanthropy.

Thank you for considering a planned gift with SMUS. Throughout our nearly 120-year history, students have benefitted from the leadership and service of outstanding individuals such as yourself who fully embody the school's Vision. Starting with the very foundations of St. Michael's School and University School, to our amalgamated school of today, many exceptional people have contributed to an enduring legacy of educational excellence.

From the classroom to your life and ultimately through your legacy, you are connected to this network of learners and leaders. When you choose to support SMUS through planned giving, your generosity extends to decades of students who believe in the values of SMUS: respect, courage, honesty and service.

We invite you to be a part of this shared legacy by making a gift of a lifetime to the students of St. Michaels University School.



About St. Michaels University School

We have a global reputation as one of Canada's leading independent schools, offering co-educational day (*Kindergarten to Grade 12*) and boarding (*Grade 8 to 12*) programs. This success is grounded in the intertwining of the two key roots of St. Michael's School and University School. With the support of a vibrant community of students, parents, faculty, staff, alumni and many others, we have grown rapidly and strong through the years.

We are defined by our commitment to excellence through academic rigour and a student-centred approach to learning. Guided by talented faculty, our Junior, Middle and Senior School students develop a love of learning and excel in academics, arts, athletics, leadership and service.

With nearly 9,000 alumni around the world and almost 120 years of history, the SMUS community is known for its commitment to our Vision: To learn, to lead, to serve.

In 2020, SMUS launched Floreat, an ambitious new strategic plan with a focus on our foundation, preparation for life, sustainability and community. Visit floreat2030.ca to find out more.



Why Make a Planned Gift?

Planned gifts offer an opportunity to extend your philanthropic support beyond a lifetime. Often considered the ultimate gift you can give, it is a timeless opportunity to serve the community. Tailored to your interests and unique giving situation, your gift is integral to our collective investment in the education St. Michaels University School provides.

Benefits to You and Your Family

- Structure a gift of significant value that does not impact your current finances and may also provide tax relief benefits for your estate and family.
- Join a class of exceptional philanthropists as a member of our Legacy Circle and be invited to special events with the school.
- Become part of the school's historic story by providing a legacy that benefits thousands of young people.

Benefits to SMUS and Our Students

- Make a real difference in the lives of young people who will grow up to become the next generation of leaders, innovators and philanthropists.
- Ensure the school is available to extraordinary and deserving students by providing access to financial aid from an increased endowment fund.
- Contribute to SMUS's long-term financial security, allowing the school to respond to student needs in a changing world, and ensuring we can provide an outstanding education for another 120 years.



Opportunities for Life

Jane Gardiner's connection to SMUS is multi-faceted. Her husband, Peter Gardiner, taught and worked at the school for 51 years while she taught science at another local independent school before transitioning to the provincial Ministry of Education. Together, they were houseparents for six years and both of their children are Lifers. Now, as a donor, she remains deeply committed to supporting financial aid.

"After 50 years of observing the evolution of the school, I am convinced that SMUS is a world-class school," she says. "It provides an outstanding learning environment."

Funding scholarships enables a number of outstanding young people to take advantage of the many and diverse opportunities offered by the school, she says. Supporting financial aid is her family's way of ensuring more students can benefit from these opportunities.

"It has been a fine school for a long time, and it just gets better," she says. "By giving either now or in the future we can continue to give deserving students the benefit of a SMUS education."



Gifts in Action

Philanthropy has changed the landscape of St. Michaels University School and enriched the everyday student experience throughout our history. From new facilities to financial aid and programming inside and outside of the classrooms, our students benefit immensely from the foresight and generosity of planned gifts.

Some examples of this impact include:

Financial Aid

SMUS provides approximately \$1.7 million in financial aid every year thanks in part to the support of planned gifts received and endowment fund earnings. With 20% of our student population benefiting from this generosity, we are able to remove financial barriers to attending the school for many.

Program Facilities

From the squash courts to our classrooms, purpose-built spaces on our campuses bring the innovative ideas and teaching of our faculty to life to enhance the student experience. Our facilities are the foundation of solid sports coaching, lively arts curricula and leading academic programs.

Sun Centre

Officially opened in 2018, the Sun Centre has become a social hub for our Middle and Senior School students who come together to share their meals and their downtime here. The bright and warm space is the perfect backdrop for the nutritious meals that fuel our students' days.



How to Make a Planned Gift

After you have provided for your family and those you love in your will, please also consider naming St. Michaels University School as a beneficiary. This is an extraordinarily meaningful way to leave a legacy.

There are many kinds of planned gifts including, but not limited to, simple bequests in a will or trust, gifts in kind and gifts of RRSPs, TFSAs and insurance. As planned gifts may make use of legal and tax strategies, we recommend you speak with a lawyer, financial advisor and/or tax professional to discover which option is best suited to your unique needs.

Bequests

A bequest is a gift made through a will or living trust. It is usually a set dollar amount or percentage of an estate that goes to a charitable organization after a donor's passing. To include a bequest in your will, you will need to give the legal professional drafting your will our legal name, address and charitable business number. It is essential that this is correct:

St. Michaels University School Society
3400 Richmond Road
Victoria, BC
Canada V8P 4P5

Charitable business number 1 0803 2988 RR0001

Gift of Securities

A gift of securities is a gift that can include publicly traded stocks, bonds and mutual funds. There may be tax advantages to you if you are considering this gift vehicle, either during your lifetime or after. You are best served if you contact SMUS before making such a gift. You may also include securities in a bequest.

Other Means of Giving

There are other vehicles that could be considered in your estate planning that may have beneficial tax advantages for donors. Again, we recommend in all cases that you discuss your financial decisions with your own lawyer, financial advisor and/or tax professional.



*Left to right: Nick Etheridge '61,
Leslie Hinton '22, Bryan Tassin '61*

Community for Life

Nick Etheridge '61 attended St. Michael's School through the generosity of others. A bursary removed the financial barrier to attending, and inside the school he found a community for life.

He graduated from University School after completing his primary years at St. Michael's School. He credits the schools with helping him discover his academic interests, a focus that would go on to inform his 35-year career with Global Affairs Canada. Through learning and life, Nick remains committed to the value of community and citizenship.

“Whether you are a ‘capital L’ leader or not, you can contribute to community and that is the most important thing,” he says.

It is for this reason he is choosing to support the school through a planned gift.

“Community is extremely important. That is something the school can impart, and it did when I was there. I have a sense of belonging. I am supporting SMUS through my estate to pay forward the opportunity I was given.”



THE
STORIES
OF OUR
LIVES

By 4N

Join the Legacy Circle

If you have questions or have decided to leave St. Michaels University School a gift in your will, we would love to hear from you. You can start the conversation in three easy steps.

1. Contact us to learn more, or to share your intentions and interests. This non-binding conversation ensures we can honour your support as you wish and engage you in events and other opportunities that have value to you.
2. Contact your lawyer, financial advisor and/or tax professional to discuss your giving options and what gift structure best supports your goals.
3. If you decide to formalize your gift, complete our Legacy Circle form. This is a statement of your intentions only and can be updated at any time should your wishes change.

Are you already a donor to SMUS? Your support of our Annual Appeal is the opportunity to have immediate impact on our students. Planned giving is a decision to turn a lifetime of support into a legacy for generations.



Our Commitment to You

We will invest wisely.

We will respect your wishes.

We will honour your generosity.



Contact Us

On behalf of the Board of Governors, our community and our students, thank you for your foresight and generosity as you consider planned giving opportunities with St. Michaels University School. We invite you to contact us to discuss your wishes.

Shara Campsall

Director of Advancement

Tel: 1-250-370-6197

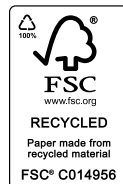
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