

## Gift Acceptance Policy

Office of Administration:	Office of the Chief Advancement Officer
Approval Authority:	Board of Governors
Approval Date:	14 February 2014
Next Review:	February 2018
Review History :	New

### 1. Purpose

- 1.1. This document has been established to guide decisions about the acceptability of gifts and to outline the types of gifts that Laurentian University will and will not accept.

### 2. Scope

- 2.1. This Policy document has been established to govern the management of all private contributions made directly to Laurentian University and those donations made through Laurentian, but directed to one of its Federated partners, the Northern Ontario School of Medicine and any of its other subsidiaries or affiliated organizations, whether such contributions are inter vivo (lifetime) gifts, gifts from estates, or gifts from organizations.

### 3. Glossary of Terms

#### 3.1. Gift

A voluntary transfer of cash and/or in-kind, from individuals, industry, foundations and other entities to the University for either unrestricted or restricted utilization in the operation of the University. Gifts are made without expectation of return; no consideration - no benefit of any kind - to the donor or to anyone designated by the donor may result from the payment. Gifts may be monetary (cash, cheques) or non-monetary (e.g. securities, real property, or personal property). Processing of gifts as defined is by the Alumni & Development Office.

#### 3.2. Grant

Revenue received by the University from individuals, industry, foundations, governments, and other sources, for the support of University programs and projects.

#### 3.3. Contract/Research Agreement

Restricted payments received by the University from various contractors, made in accordance with the terms of contracts entered into by the University to conduct specific programs.

3.4. Official Charitable Receipt

The official charitable receipt is a statement issued by the University to donors that includes the registration number issued to the University by Canada Revenue Agency, a declaration as to the value of the gift, date of the gift and name of the donor. Receipts are normally accepted by Canada Revenue Agency to support the calculation of the allowable non-refundable tax credits for individuals, and tax deductions for corporations.

3.5. Gift-in-Kind

Donated tangible and intangible assets and property such as real estate, notes, mortgages, limited partnership interests, royalty or copyright interests, art, books, equipment, automobiles, inventory, personal property, securities, and other physical assets or materials which represent value to the University.

3.6. Pledge

Contributions to Laurentian University may be pledged over a period of time (often over a number of years, depending on the size of the gift and the nature of the appeal). Payments made on a pledge will normally be receipted when received.

**4. Vision and Principles**

- 4.1. The importance of voluntary charitable contributions to Laurentian University is increasingly apparent. Laurentian University welcomes gifts which enable it to fulfill its mission of teaching, research, and community service. As such, the University welcomes the gifts of individuals, corporations, and foundations to help achieve its academic mission, and to enhance programs and services to students.

**5. Key Roles & Responsibilities**

- 5.1. The Development Office and other units or individuals designated by the Chief Advancement Officer (CAO) are authorized by the Board to negotiate gifts and create gift agreements with prospective donors. All gifts will be authorized by and all gift agreements, including documentation relating to the administration of estates, will be signed by the CAO or designate.
- 5.2. Documentation of gifts which are not readily valued must be prepared before acceptance. Relevant information shall be obtained and reviewed, including a copy of any appraisal by an independent qualified appraiser(s) secured by the donor, according to Canada Revenue Agency guidelines. The responsibility for fees will be determined by the CAO. It is general practice to have the donor pay for appraisals. The University reserves the right to secure and rely on its own appraisal.
- 5.3. Any gifts entailing potential material financial liability or placing unusual conditions on the University must be referred to the Board for approval. The Development Office may, at its discretion, bring to the Board other gift agreements, or proposals, as appropriate, or as required by other University policies. Decisions to accept a form of gift will not be considered as setting precedent for the next occasion.

- 5.4. Laurentian University's Development Office is responsible for issuing official charitable receipts for all charitable gifts received by Laurentian University, in compliance with the requirements of the Canada Income Tax Act, Canada Revenue Agency guidelines and in accordance with procedures established by the University. Laurentian University is a registered charity under Canada Revenue Agency guidelines. Its official charitable registration number is 11900 9686 RR000 1.
- 5.5. Only the Development Office may issue tax receipts on behalf of Laurentian University. It is the responsibility of this Department to ensure that the highest standards of professionalism are followed in the solicitation of gifts and in working with donors.
- 5.6. The University has an ethical responsibility to every donor. All staff, volunteers and professional representatives acting on behalf of the University will conduct themselves in accordance with accepted professional standards of accuracy, truth and integrity. The professional standards and code of behaviours set out by the Association of Fundraising Professionals (AFP) and the Canadian Association of Gift Planners (CAGP) will serve as the ethical guidelines when raising funds for the University.

## **6. Gift Acceptance**

- 6.1. Eligible Gifts. For the purposes of these policies, the following types of gifts are eligible for processing consistent with approved policy:
  - 6.1.1. Cash
  - 6.1.2. Gifts-in-Kind
  - 6.1.3. Real Estate
  - 6.1.4. Bequests
  - 6.1.5. Life Insurance
  - 6.1.6. Charitable Remainder Trusts
  - 6.1.7. Gifts of Residual Interest
  - 6.1.8. Gift Annuities
  - 6.1.9. Publicly Traded Securities

## **7. Gift Receipting**

- 7.1. Gifts to the University, which are eligible for an official charitable receipt, will be receipted based on Canada Revenue Agency regulations. The official charitable receipt is a statement issued by the University that complies with Canada Revenue Agency guidelines on receipting.

- 7.2. In order to achieve accurate reporting of all charitable gift contributions to Laurentian University, and to ensure that donors are recognized for the total of all their charitable gifts, it is vital that the Development Office act as the sole conduit for all charitable gifts to Laurentian University.
- 7.3. Official charitable receipts are accompanied by correspondence prepared by the Development Office. These documents are deemed to be the official acceptance of gifts and their related terms and conditions, as well as official certification of donations for income tax purposes.
- 7.4. Gifts to the University will be receipted based on guidelines pertaining to the type of gift as follows:
  - 7.4.1. Cash – which includes payments made using currency, cheques, credit cards, electronic funds transfers and payroll deductions. Cash gifts are receipted for their value in Canadian Dollars (CAD).
  - 7.4.2. Gifts-in-kind – which include artwork, equipment, books and other property. A charitable receipt is issued for all gifts-in-kind for the fair market value at the date of transfer. An independent qualified appraiser determines the value and appraisal costs are the responsibility of the donor unless otherwise approved by the University.
  - 7.4.3. Real Estate – outright gifts of real estate will be receipted for the appraised value of the property. The cost of appraisal will be recovered by the sale of the property. The University shall review factors including zoning restrictions, marketability and current use to ascertain whether acceptance of the real estate would be in the best interest of the University. The final decision on acceptance of the property will be made by the Board of Governors.
  - 7.4.4. Bequests – either a specific amount, a portion or the residue of a person’s estate, or a property such as life insurance proceeds, stocks, bonds, or other assets. Receipts are issued to the estate of the donor upon transfer of the gift.
  - 7.4.5. Life Insurance – when the ownership of the policy is assigned the University, the donor will be entitled to a receipt for the net cash surrender value (if applicable) and for any premiums subsequently paid. If the University is named as beneficiary of the proceeds, a receipt for the amount received is issued to the deceased for use on the final tax return.
  - 7.4.6. Charitable Remainder Trusts – the donor (“Settlor”) is entitled to a charitable receipt for the present value of the remainder trust.
  - 7.4.7. Residual Interest Gifts – a charitable receipt will be issued for the present value of the residual interest after the terms of the gift and responsibilities for expenses are specified in a Deed of Gift.
  - 7.4.8. Charitable Gift Annuities – a tax receipt will be issued for the amount retained by the University.

7.4.9. Publicly Traded Securities – when a gift of public securities is received, the University will issue a tax receipt for the value of the gift on the date the University took ownership of the securities. The University’s broker will sell the securities as quickly as possible as it is not the University’s intent to retain securities as part of the institution’s financial holdings. The University retains the right to decline a gift of shares if the offered public securities are deemed a liability to the University.

## **8. Gift Refusal**

8.1. While Laurentian University invites private donations, it reserves the right to refuse gifts that require conditions or expenditures that the University deems unacceptable.

8.2. Laurentian University will not accept gifts that:

8.2.1. violate federal, provincial or municipal laws;

8.2.2. require the University to provide special consideration for admission to the University for the donor or designate;

8.2.3. require the University to deviate from its normal hiring and promotion and contracting procedures;

8.2.4. relies on a third party appraisal provided by the donor that is perceived to be inaccurate or unreliable;

8.2.5. in any way limit or impose conditions on academic freedom;

8.2.6. violate the Ontario Human Rights Code or Laurentian University’s Equity and Human Rights Policies.

## **DONATIONS MANAGEMENT AT LAURENTIAN UNIVERSITY**

Procedures for Managing Gifts and Pledges

Approved by the Executive Directors, University Advancement and Financial Services

January 2014

### **I. Introduction**

The following procedures are set forth: (a) to ensure that informed decisions are made on the management of gifts and that such gifts are receipted in accordance with the requirements of the Income Tax Act; (b) to ensure that efficient administrative, legal, and accounting practices and procedures are followed and, (c) to enable accurate reporting of gifts bestowed upon Laurentian University and its affiliated organizations.

The Development Office is responsible for managing and processing all gifts to the University. It shall be the responsibility of the Development Office:

1. To process and record all gifts into the database.
2. To issue official charitable receipts for all charitable gifts received by Laurentian University, in compliance with the requirements of the Income Tax Act, and in accordance with procedures established by the University. Laurentian University is a registered charity under the Canadian Revenue Agency guidelines. Its official charitable registration number is 11900 9686 RR0001.
3. To send pledge reminders to all donors.

### **II. Receiving a gift**

#### **Cheques:**

1. The Development Secretary scans the cheques and dates them electronically.
2. The Donor Relations Clerk will add the donation information to the Daily Donations spreadsheet.
3. The Donor Stewardship Officer will put the cheques in the safe until they are ready to be processed.

#### **Credit Card:**

1. The Donor Stewardship Officer will charge the card on the Point of Sale (POS) debit/credit card machine as soon as possible and places the documentation<sup>1</sup> in the safe until the donation can be processed.
2. The Donor Relations Clerk will add the donation information to the Daily Donations spreadsheet.

Note: The donation has to be processed in the Colleague Advancement Database on the same day that they are processed on the POS machine.

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<sup>1</sup> Related documentation for donations includes the credit card/debit slip, letter or donation form that was included with the gift etc.

**Cash Gift:**

1. Two members of the Development Office will count the money or the Donor Stewardship Officer will count the money in front of the donor. The Donor Stewardship Officer will immediately issue an over the counter receipt to the donor or the person delivering the gift and put the money in the safe.
2. The Donor Relations Clerk will add the donation information to the Daily Donations spreadsheet.

Note: Cash donations should be processed within two days of receiving the gift.

**Electronic transfer:**

1. The Donor Stewardship Officer accepts the transfer on the RBC website. A report of the transfer is then printed and put in the safe until the donations can be processed.
2. The Donor Relations Clerk will add the donation information to the Daily Donations spreadsheet.

Note: The donation has to be processed in the Colleague Advancement Database the same day they are received

**Negotiable Securities:**

1. The Development Officer sends the Negotiable Securities Form to the donor.
2. The donor or their financial representative completes the form and returns it to the Development Office or Laurentian University's broker and arranges the transfer through Laurentian University's broker.
3. Laurentian University's Stock Broker receives the Negotiable Securities and informs the Development Office of the fair market value at the time of the transfer.
4. The Donor Stewardship Officer will process the Fair Market Value of the Negotiable Securities into the database and issue a tax receipt if the donor is eligible.
5. The University's broker sells all securities as soon as the transfer is complete unless the broker is concerned that this will devalue the securities. In this second case, the Executive Director, University Advancement, coordinates with the Executive Director, Financial Services, to decide the minimum price at which the shares should be sold (if required).
6. Laurentian University's Stock Broker will issue a cheque when all shares or a large portion of the shares (whichever comes first) are sold.
7. The Donor Stewardship Officer will send the cheque to finance to be deposited via memo and budget number. The cheque is not processed through the database.

**Gift in Kind:**

Examples of gifts in kind can range from art and lab equipment to real estate.

1. The donor will have the gift in kind appraised. The appraisal must be done by an expert in the field who is not associated with the donor or the University.

2. The Executive Director of University Advancement will accept or decline the gift in kind<sup>2</sup>.
3. If the gift being donated was purchased within the last three years, the Donor Stewardship Officer will take the smallest amount between the original sale price and the appraisal for the credited amount. If the gift was purchased over three years ago, the appraisal should be used for the tax receipt.
4. The department notifies the Donor Stewardship Officer when they have received the gift.
5. The Donor Stewardship Officer sends all documentation and the Gift in Kind Form to the Executive Director, Financial Services, for his approval and signature.
6. The Donor Stewardship Officer processes the gift and issues a tax receipt.

Note: Prior to accepting gifts of real estate the Executive Director of Advancement will consult with the President/Executive Team who may decide to submit the decision to the Property Development Committee to determine if the gift is to be accepted by the University.

### **Planned Gifts (see planned gifts definitions in Annexe A):**

#### Residual Interest Gifts:

1. The gift must be approved by the Executive Director of University Advancement and the Executive Director, Financial Services.
2. When ownership of the property to be gifted is passed to the University the Donor Stewardship Officer will issue a tax receipt based on the assessed fair market considering the appraised value at the time of transfer less the interest to the donor based on actuarial calculations as determined by the Canada Revenue Agency.

Note: Gifts of real estate must be submitted and approved by the Property Development Committee.

#### Bequests:

1. The Donor Stewardship Officer will record the gift as a bequest in the database.
2. Terms will be written and signed according to the donor's wishes.
3. The Donors Stewardship Officer will issue a tax receipt to the estate when the property being bequeathed is received by the university.

#### Charitable Remainder Trusts:

1. A term of reference document will be created according to the donor's wishes with the approval of the Executive Director, Financial Services with the outlined income interest.
2. The Donor Stewardship Officer will issue a tax receipt for the fair market value of the gift.
3. The University requires that a minimum gift of \$250,000 be made to create a charitable remainder trust.

#### Charitable Gift Annuities

1. A term of reference document will be created according to the donor's wishes. The income that will be attributed to the donor annually shall be approved of the Executive Director, Financial Services, before a gift of this type is accepted.

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<sup>2</sup> For the exception of the library who will provide a list in December of gifts received throughout the year.



2. The Donor Stewardship Officer will issue a tax receipt for the present fair market value of the gift.
3. The University requires that a minimum gift of \$250,000 be made to create a charitable gift annuity.

### **III. Processing preparation**

#### **Database Records:**

If a donor record has not yet been created in the Colleague Advancement database:

- The Donor Stewardship Officer creates a new database record for the individual donor.

OR

- The Donor Stewardship Officer sends the Organisation name and address to the Purchasing Department for the database record to be created.

#### **Designation:**

- For existing designations, the Donor Stewardship Officer will find the correct code on the master list in the Database Admin folder on the shared drive.
- For new designations, the Donor Stewardship Officer will ask finance to open a new budget and the Database Administrator to create a code.

Campaign:

- The Donor Stewardship Officer chooses the corresponding datatel campaign for the gift (i.e. Laurentian Community, Student Awards).

### **IV. Processing**

1. The Donor Stewardship Officer will process one type of gift at a time (i.e. all cheques or all cash gifts or all online gifts).
2. Once the donation has been processed in the database (see Database processing procedures available in the Development Office), the Donor Stewardship Officer prints out both reports generated by the database and sends them to the Treasury Department with the donations deposit (cheque, cash).
3. For cheques and cash the Donor Stewardship Officer will also complete a deposit slip and include it with the deposit to the Treasury Department.

### **V. Gift Receipting**

1. The Donor Stewardship Officer prints out receipts on the same day or the day after the gift is processed<sup>3</sup>. Receipts are printed for individuals and companies (See sample in Appendix B). Over the counter receipts are issued for Associations, Clubs and Foundations.
2. A thank you card is sent out with the receipts according to the following levels (See Appendix B for samples):

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<sup>3</sup> Unless it is a monthly donor or a donor who prefers to have an annual receipt.

- a. Generic thank you card: Up to \$500
- b. Personalized thank you card: \$500 to \$100,000
- c. Thank you letter: over \$100,000<sup>4</sup>

Note: The charitable portion of a tax receipt for events and auctions shall be determined according to CRA rules and regulations. Generally, if the gift portion is less than \$35.00 a receipt will not be issued.

## **VI. Northern Ontario School of Medicine (NOSM)**

When the payment is made to Laurentian University

1. The Donor Stewardship Officer processes the donation in the database and deposits the cheque into the correct budget. (If the Laurentian University Development Office doesn't have access to the budget, it is deposited into a holding account and Finance transfers it to NOSM.)
2. The Donor Stewardship Officer issues the tax receipt
3. The Donor Stewardship Officer sends a scanned copy of the cheque and/or other donation documentation to the NOSM Advancement Office.

If the donation is made out to NOSM:

1. The NOSM Advancement Office sends the Donor Stewardship Officer a copy of the cheque and/or other donation documentation.<sup>5</sup>
2. The Donor Stewardship Officer processes the donation in NOSM's record and soft credits the donor in the database.

## **VII. Federated Universities**

1. The Donor Stewardship Officer processes the donation in the database and deposits the cheque in the university budget. The Donors Stewardship Officer arranges the transfer of funds between these budgets and the Federated University budget through finance twice a year<sup>6</sup>.
2. The Donor Stewardship Officer issues the tax receipt
3. The Donor Stewardship Officer sends a scanned copy of the cheque and/or other donation documentation to the Federated University.

If the donation is made out to a Federated University:

1. The Federated University sends the Donor Stewardship Officer a copy of the cheque and/or other donation documentation.
2. The Donor Stewardship Officer processes the donation in the Federated University's record and soft credits the donor in the database.

## **VIII. Payroll Deduction**

1. The Donor Stewardship Officer enters the pledge in the employees database record

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<sup>4</sup> Unless otherwise stated by the Development Officer.

<sup>5</sup> Endowments are transferred to the University and the interest is deposited into NOSM budgets.

<sup>6</sup> Unless the amount is over \$1,000.

2. The Donor Stewardship Officer makes a .pdf document of the database pledge screen and sends it to the Payroll Office along with a scanned version of their pledge form.
3. The Payroll Office enters the pledge into the database.
4. Every month, after the 25<sup>th</sup>, The Donor Stewardship Officer runs an AUTO report in the database to collect the payments and ensures that all new payroll deductions were processed correctly.
5. No receipt is issued by the Donor Stewardship Officer because the donation will appear on the employees T4 income tax information slip.

## **IX. Memorial Awards**

- The Donor Stewardship Officer prepares a memorial letter when someone first establishes a memorial award unless other directions are given by the donor (See Appendix E for sample)
- The Donors Stewardship Officer advises the contact person for the award when a donation is made to the award. The gift amount is not specified, only the donor's name is indicated (unless the donor has expressed a wish to remain anonymous).

## **X. Gifts in Memory of or to Honour Someone**

- When donors make a gift in memory of or to honour someone, the Donor Stewardship Officer will ask them if they would like the Development Office to notify the family of the person being memorialized or the person who is being honoured. If yes, the person or family will be notified.
- Gifts made in memory or in honour of someone can be made to any designation.

## **XI. Pledge Reminders**

- Pledge reminders shall be generated every month (See Appendix D for a sample letter).
- Content of pledge reminder letters is the responsibility of the Donor Stewardship Officer, with final approval from the Director of Development.

### **Pledge Reminder Schedule**

Reminder Method	Staff Member Responsible	Amount of Time Between Correspondence
Personalized Pledge Reminder letter /card (Every month)	Donor Stewardship Officer	Sent 2 months before the pledge payment is due
Personalized e-mail or phone call Pledge Payment Reminder	Donor Stewardship Officer	1 month after pledge payment is due
Personal Follow up	Development Officer	2 months after pledge payment is due
Personal Follow up	Development Officer	6 to 8 months after pledge payment is due
Write off notification	Development Officer	12 months after missed pledge payment (unless other directions are received by the donor)

## **APPENDIX A**

### **Planned Gift Definitions**

#### **Bequest**

A bequest is the donation of personal property and or other assets such as money and securities through a will or estate plan.

#### **Charitable Remainder Trusts**

A charitable remainder trust is an irrevocable transfer of assets such as a sum of money or securities that are donated to the charity but the interest is still given to the donor (or their heir) during their lifetime and/or their heir's lifetime.

#### **Residual Interest Gifts**

A residual interest gift is the donation of property (real estate, art, etc) where the donor and/or his/her family continue to enjoy the benefits of the property during their lifetime or for a fixed term. During the term the charity owns the property and maintains it for the benefit of the donor. At the end of the term the charity may use or dispose of the property.

#### **Charitable Gift Annuities**

A charitable gift annuity is a contract between the donor and the charity, where the donor transfers cash or property to the charity in exchange for a partial tax receipt and a lifetime stream of annual income from the charity. When the donor dies, the charity keeps the gift.



## APPENDIX B

### Sample text for generic thank you card for gifts with a value up to \$1,000:

*On behalf of the entire Laurentian Community, our most heartfelt thanks for your recent contribution. Your generosity will ensure the brightest possible future for Laurentian University, its students, and our community.*

*Once again, thank you for helping drive creativity, innovation, and prosperity*

### Sample of tax receipt

	<b>Laurentian University</b> <b>Université Laurentienne</b> Laurentian University of Sudbury 935 Ramsey Lake Rd, Sudbury ON Canada P3E 2C6	<b>Receipt Number:</b> 000000000 <b>Date Received:</b> DD/MM/YEAR <b>Date Issued:</b> DD/MM/YEAR
<b>We gratefully acknowledge your gift of:</b> \$ Gift Amount		<b>Designation</b> Gift Designation
Name of donor Address		
<b>Reference Number</b> 0000000	<b>Business Number</b> 11900 9686 RR0001	 <b>Executive Director, Financial Services</b>
Official receipt for income tax purposes.		Canadian Revenue Agency . <a href="http://www.cra-arc.gc.ca/charities">www.cra-arc.gc.ca/charities</a>

### Back of Receipt

The information on this form is collected under the authority of the *The Laurentian University of Sudbury Act, 1960*. It is related directly to and needed by the University for the purpose of fundraising and related activities. The information will be used and disclosed only for this purpose. If you have any questions about the collection, use, and disclosure of this information please contact the Director of Development, Laurentian University, 935 Ramsey Lake Road, Sudbury ON, P3E 2C6. 705.675.4872.

Les renseignements demandés dans ce formulaire sont recueillis en application de la *Loi de l'Université Laurentienne de Sudbury, 1960*. Ils sont directement liés au prélèvement de fonds ainsi que les activités reliées et l'Université en a besoin pour s'acquitter de cette fonction. Ils seront utilisés et divulgués à ce but unique. Si vous avez des questions au sujet de la collecte, de l'utilisation et de la divulgation des ces renseignements, veuillez communiquer avec la Directrice de développement, Université Laurentienne, 935 Chemin du lac Ramsey, Sudbury ON, P3E 2C6. 705.675.4872.

## **APPENDIX C**

### **Sample Thank you letter for gifts of more than \$100,000.**

DATE

«Prefix» «FIRST\_NAME» «LAST\_NAME»  
«ADDRESS\_1»  
«ADDRESS\_2»  
«ADDRESS\_3»

Dear «SALUTATION»,

On behalf of the entire Laurentian University community, I want to thank you for your \$«GIFT\_AMOUNT» donation directed to the «DESIGNATION». Without a doubt, contributions from generous benefactors such as you will ensure the brightest possible future for Laurentian and its students.

Much like the picturesque northern landscape in which it is situated, Laurentian University—Northern Ontario's largest postsecondary institution—is recognized as a symbol of strength, diversity and adaptability. Originally created to provide Northern Ontario residents with an undergraduate education, Laurentian has flourished over the past five decades to become one of the province's premier centres for learning and innovation in undergraduate and graduate education.

A uniquely inclusive university with a bilingual and multi-cultural mandate, Laurentian boasts a student body of nearly 10,000 at its Sudbury and Barrie locations. These talented individuals pursue excellence in over 150 exceptional undergraduate programs, as well as 8 doctoral and 23 masters and research programs while enjoying some of the lowest average class sizes in Canada.

Laurentian has one of the highest post-graduation employment rates in Ontario, leaving little doubt that Laurentian graduates leave the institution with the skills necessary to achieve success in their professional careers.

Once again, I would like to extend my sincere thanks and appreciation for your commitment in support of Laurentian's hardworking students. There is no question that this investment will allow Laurentian to pursue its strategic goals while continuing to drive creativity, innovation and prosperity in Northern Ontario and beyond.

With sincere appreciation,

Tamas Zsolnay  
Executive Director, University Advancement

## APPENDIX D

### Pledge Reminder Sample Letter

DATE

«Prefix» «FIRST\_NAME» «LAST\_NAME»  
«ADDRESS\_1»  
«ADDRESS\_2»  
«ADDRESS\_3»

Dear «SALUTATION»:

On behalf of the entire Laurentian community, I want to extend my sincere thanks and appreciation for your pledge of \$ «PLEDGE\_AMOUNT» to the «designation». This investment will contribute to the success of many deserving students at Laurentian University.

Laurentian University has been one of the fastest growing universities in Canada in the past decade which has resulted in:

The highest post-graduation employment rates in Ontario;  
Enrollment of more than 10,000 students annually; 1,200 of which are located at our Barrie Campus;  
Securing its second chancellor, Steve Paikin, succeeding Ms. Aline Chrétien who completed her term in June 2013.

I am writing today to remind you that your pledge payment is due on «Payment Date» . Please return the attached slip along with your payment to ensure that our students benefit from all pledged support. Cheques should be made payable to **Laurentian University**. For your convenience, pledges may be paid using Visa or MasterCard via telephone at 1-800-461-4030 extension 4872. Payment can also be made online at <https://donations.laurentian.ca>.

Once again, on behalf of all those who will benefit from your generosity, thank you for your ongoing support. There is no question that your contribution will have a tremendous impact on the lives of our very deserving students.

With sincere appreciation,

Stephanie Corrigan  
Manager, Acquisition Program

P.S. If this letter crosses your cheque in the mail, please accept my sincere thanks. You will receive an official acknowledgement letter and charitable tax receipt shortly.



«Prefix» «FIRST\_NAME» «LAST\_NAME»  
 «ADDRESS\_1»  
 «ADDRESS\_2»  
 «ADDRESS\_3»  
 «ID»

Designation:	«DESIGNATION»
Total Pledge:	\$«PLEDGE_AMOUNT»
Outstanding amount:	\$«OUTSTANDING_AMOUNT»
This payment:	\$«AMOUNT_DUE»

**Method of payment:**

- Monthly electronic funds transfer (please include void cheque)
- Credit card: VISA or MasterCard

Card #: \_\_\_\_\_ Expiry: \_\_\_\_\_

- Cheque(s) payable to Laurentian University.
- I would like to remain anonymous.
- I authorize Laurentian University to withdraw the amount indicated from my bank account or credit card. I understand I may cancel this authorization at any time.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**APPENDIX E  
 Memorial Letter Sample**

October 16, 2013

«FORMAL\_NAME»  
 «ADDRESS\_1»  
 «CITY» «PROV» «PC»

The XXX Memorial Award

Dear «SALUTATION»:

Thank you for your gift of \$«Amount» designated to the XXX Memorial Award in memory of XXX. Your kindness and generosity will be remembered in a time when it's deeply appreciated.

The XXX Memorial Award is a powerful testament to the love XXX inspired in all those who knew him. This bursary will help students in XXX program at Laurentian University thrive and excel throughout their education. It also ensures that although XXX is no longer with us, his memory will live on.

Once again, I would like to extend my sincere thanks and appreciation to you for your commitment in support of Laurentian's hardworking students.

Laurentian University is honored to be associated with the name of someone who has touched your life.

With warmest regards,

Stephanie Corrigan  
 Manager, Acquisition Program