



**GIFT ALLOCATION AGREEMENT**

**THIS AGREEMENT** is made as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_,

**BETWEEN:**

**LUTHERAN CHURCH-CANADA FINANCIAL MINISTRIES**  
operating as LUTHERAN FOUNDATION CANADA  
(herein called "LCCFM")

OF THE FIRST PART

- and -

\_\_\_\_\_  
(herein collectively called the "DONOR")

OF THE SECOND PART

WHEREAS LCCFM is a public foundation working on behalf of Lutheran Church – Canada and her affiliated organizations and congregations;

AND WHEREAS Canada Revenue Agency has encouraged LCCFM to accept gifts on behalf of the various organizations and congregations affiliated with Lutheran Church – Canada;

AND WHEREAS LCCFM has a fiduciary responsibility to Canada Revenue Agency, Lutheran Church – Canada, her affiliated organizations and congregations, and to any individual who has given a gift;

AND WHEREAS LCCFM must adhere to the stated use or disbursement of any and all gifts accepted by LCCFM;

AND WHEREAS the DONOR intends to include LCCFM as a beneficiary to some portion of their estate;

NOW THEREFORE in consideration of the covenants herein contained the parties agree as follows:



**AGREEMENT:**

1. The DONOR hereby acknowledges that LCCFM shall have no liability or obligation whatsoever to the DONOR'S heirs, administrators, executors, trustees or assigns, save that which is outlined herein.
2. LCCFM agrees that upon receipt of funds from the DONOR or the DONOR'S estate, those funds shall be disbursed as follows:

Organization Name	Charitable Number	% of total	Purpose

3. Should any of the beneficiaries named in the above clause, no longer exist at the time the gift is received, their designated portion shall be disbursed (choose one):

- at the discretion of the LCCFM Board, or their successors. This discretion would be linked as closely as possible to the DONOR'S original intent.
- equally between the remaining beneficiaries.
- to Lutheran Church – Canada for missions.

4. Do you want these gifts to be given anonymously?     Yes     No

**Accepted by:**  
Donor

**Accepted by:**  
Lutheran Church-Canada Financial Ministries

\_\_\_\_\_  
Name

\_\_\_\_\_  
Allen Schellenberg – Executive Director

\_\_\_\_\_  
Name