

A hospital is truly the cornerstone of a community. It's where precious lives are saved. It's a place we all can count on. Having the very best medical equipment, expertise and compassionate care close to home is a priceless gift that's only possible with your caring support. By including Saugeen Memorial Hospital Foundation in your Will, you can have a significant impact on the quality and accessibility of healthcare for family, friends and neighbours in Saugeen Shores.

WHAT IS A CHARITABLE BEQUEST?

A bequest or gift by Will is the simplest and most popular way of making a planned gift to the Foundation. It is a convenient and effective way for you to leave a lasting legacy or honor the memory of a loved one. A bequest also ensures that our health care professionals are able to continue to provide the best care to their patients for generations to come.

WHAT ARE THE BENEFITS?

- **Convenient:** A charitable bequest can be made no matter how old you are and in any amount you want.
- **Simple:** A bequest is easy to arrange. Simply instruct your lawyer to include a bequest to the Foundation in your Will, or in a Codicil to your Will.
- **Cost-Effective:** There are no extra out-of-pocket costs. Your present income will not decrease.
- **Tax Relief:** The Foundation will issue a charitable receipt. It may be applied against income earned by you or your Estate over up to seven years, enabling Trustees to take full advantage of the tax savings.
- **Flexible:** Your bequest can be for a specific amount, a percentage of your Estate, or the residue of your Estate (a gift after your debts, taxes and specific legacies have been paid).
- **Peace of Mind:** You retain use of all your assets for the duration of your lifetime. You can make changes to your Will at any time.

HOW DO I MAKE A BEQUEST?

Making a bequest is simple. If you have already prepared your Will, you can update it with a Codicil, a supplementary paragraph added to your present Will, describing your gift intentions. If you have not yet prepared a Will, we recommend you do so! This is an important "first step" to ensure that your intentions for your Estate are documented and that your family and loved ones will be properly cared for.

You may make a specific bequest, which means that you designate a specified amount to the Foundation; or you may make a residual bequest, which means that you designate all or a percentage of the remaining portion of the Estate to the Foundation after specific legacies, debts, taxes, and administrative expenses have been paid.



SAMPLE WORDING FOR YOUR WILL:

Unrestricted Use - Specific Bequest:

Pay to Saugeen Memorial Hospital Foundation: Charitable # 88959 9825 RR0001, the sum of \$..... to be used for the benefit of the Foundation as its Board of Directors may determine from time to time.

Precatory:

Pay to Saugeen Memorial Hospital Foundation: Charitable # 88959 9825 RR0001, the sum of \$..... Without imposing any restrictions upon this bequest, it is my wish that it be used for under the direction of the Board of Directors of the Foundation.

Unrestricted Use - Residual Bequests:

Pay to Saugeen Memorial Hospital Foundation: Charitable # 88959 9825 RR0001, the whole of the residue (or ____ percent of the residue) of my Estate to be used for the benefit of the Foundation as its Board of Directors may determine from time to time.

Endowment - Specific Bequest:

Pay to Saugeen Memorial Hospital Foundation: Charitable # 88959 9825 RR0001, the sum of \$..... to be permanently endowed as part of the Foundation's Caring for Tomorrow Endowment Fund, with a portion of the annual income used at the direction of the Board of Directors.

ABOUT SAUGEEN MEMORIAL HOSPITAL FOUNDATION:

Our mission is to raise and manage funds for equipment, facilities and staff development to ensure our community and visitors have access to the best possible hospital care.

We are one of five Foundations that support Brightshores Health System hospitals in Owen Sound, Markdale, Meaford, Wiarton, Lion's Head and Saugeen Shores. Funds raised are used to purchase medical equipment and support other projects such as facility improvements, medical research and clinical staff education.

Each year our goal is to raise nearly \$2 million to purchase items from Brightshores' list of priority equipment needs. Very little government funding is provided to hospitals for new and replacement equipment.

Donor support is key to ensuring that our Hospital continues to thrive!

FOR ASSISTANCE, PLEASE CONTACT:

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Saugeen Memorial Hospital Foundation
340 High Street, Southampton, ON N0H 2L0
Charitable Registration #88959 9825 RR0001

Visit www.smhfoundation.ca to learn more.



This information provides a brief overview on planning a gift to Saugeen Memorial Hospital Foundation. It is general in nature and subject to change according to individual circumstances. You should always consult your own professional advisors for detailed information tailored to your own circumstances and to confirm applicable tax benefits.