



Legacy Giving to
Huntsville Hospital Foundation

A Circle of Giving

The circle of life is central to the concept of Legacy Giving. We live fully, we leave behind a legacy of generosity. The circle concept also reflects completion of the journey, in the company of others, counting on each other as people so often do. The Huntsville Hospital Foundation's Legacy Circle encompasses all of these ideas. What you leave behind completes your contribution to a new generation. This is the essence of Legacy Giving.

A gift of assets in your estate and enshrined in your Will declares your intention to join our circle. And that means the world to everyone who loves life here today and those who will follow tomorrow.

How the Legacy Circle Works

When philanthropy is connected to estate planning, it becomes Legacy Giving. You can choose an income-generating asset now or any variety of assets that are available upon death. Huntsville Hospital Foundation is named as beneficiary and you can set conditions in your will as you see fit. Legacy Giving provides tax and estate distribution options without impacting your current income, and it is increasingly a preferred choice of major donors who want to leave a legacy of generosity in this community.



Different Ways to Leave a Legacy

BEQUESTS

You can bequest cash, securities or property by naming Huntsville Hospital Foundation as a beneficiary and specifying the conditions of your gift in your will.

SEGREGATED FUNDS

Segregated funds are a highly effective estate planning tool as there is no health or medical requirement and the holder can name a beneficiary. In the event of death, the beneficiary named in the policy is paid directly and not through your estate. This keeps the segregated fund out of your Will and by-passes probate fees.

SECURITIES

Shares in corporations can be donated to the Foundation, and when sold at fair market value, trigger a tax receipt for your estate.

RRSP OR RRIF DESIGNATIONS

One key advantage of Legacy Giving is that you can defer your gift. This gives you the opportunity of providing larger gifts, without impacting your existing finances or lifestyle. Naming the Foundation as the beneficiary for RRSPs or RRIFs usually eliminates the tax on this investment. Upon death, the proceeds go to the Foundation and the Estate receives the tax credit.

INSURANCE

You can name Huntsville Hospital Foundation as a beneficiary of your life insurance policy, whether it be an existing policy or a new one specific to this approach.

Lake of Bays' Les Dakens is in our Legacy Circle

Why did Les Dakens bequeath \$1 Million to Huntsville Hospital Foundation? Because in Les' words, "I love Huntsville. This is my gift to everyone I've met, to our neighbours and to their children. As a Lake of Bays resident, this is my hospital. So I decided Huntsville Hospital Foundation would be a beneficiary in my Will along with two other charities. Many in my generation have been fortunate, and fortunate people around the world are choosing Legacy Giving as their gift to the communities that helped them along. This gift is my commitment to Huntsville Hospital's Legacy Circle."

WHAT TECHNOLOGIES WILL YOUR HOSPITAL NEED TOMORROW?

Giving Here Ensures We Have The Right Tools

It is a common misconception that all hospital needs are covered by your tax dollars. The truth is, technology and equipment purchases are funded by the community – that would be all of us in Huntsville for example. So your donations here ensure our medical professionals and staff here have the technology they need to provide advanced care to you and your family.

Technology requirements advance every year; that's why we need your gifts every year, now and in the future.

Discuss your legacy at Huntsville Hospital today!

You're interested – and there's room in your legacy for Huntsville Hospital and the thousands of patients who will visit here annually. Contact us and we'll help you and your professionals work through the process, determine what fits and ensure healthcare for life, here in Huntsville for generations to come.



CALL: (705) 789-4756
EMAIL: katherine.craine@mahc.ca

Visit huntsvillehospitalfoundation.ca for additional information.

Thank you for your future gift commitment to support the future of Huntsville Hospital.

Every gift in a will makes a difference. When you make plans for a legacy donation, you are giving a future gift that will provide for Huntsville Hospital for years to come. And your impact will be big!

Legacy Giving and a gift of assets in your estate declares you as part of Huntsville Hospital Foundation's Legacy Circle. And that means the world to us and everyone who lives and visits here. For including the Huntsville Hospital Foundation in your estate plans, we want to celebrate you, include you in the benefits of the Legacy Circle and recognize the impact you make to support Huntsville Hospital.

Legacy Circle members are entitled to:

- Recognition in the Hospital in the Legacy Circle Donor Wall, with naming of your choice
- Legacy Circle Membership Certificate
- Gift of Appreciation
- Invitations, tours and special communications

You have the option to remain anonymous in terms of public. The choice is yours. Below is a confidential form which you may complete to indicate your preferences. It is important for us to get to know you and your intentions so we can ensure your wishes are fulfilled in the future by completing and returning this confidential form.

☐ I/We would like to become a member of the Legacy Circle. By letting others know of my generosity and dedication to the Huntsville Hospital Foundation, serves as motivation for others to leave a future gift to benefit Huntsville Hospital.

I/We would like our name(s) on any listings should read as follows:

or

I prefer to have this gift(s) in honour of:

☐ I accept membership, but wish to remain anonymous in terms of public recognition.

Please provide the following information:

Name	Second Name (if joint gift)	
Address		
City	Province	Postal Code
Home Phone	Cell Phone	
E-mail	E-mail	

GIFT INTENT

I/we have made a provision to leave a legacy gift to the Huntsville Hospital Foundation through my/our:

- | | | |
|------------------------------------------------|-----------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Will | <input type="checkbox"/> Living Trust | <input type="checkbox"/> Retirement Plan Assets |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Securities | <input type="checkbox"/> Real Estate | |

Optional: I/we wish to inform Huntsville Hospital Foundation, for long-term planning purposes only, that the current value of my/our future gift is \$_____. (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value). I/we understand that by stating an amount my/our estate is not legally bound by this statement and I/we may choose to add, subtract or revoke this bequest at any time.

Please take a moment to tell us about your connection to Huntsville Hospital

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

N.B. This is not a legal document

CREATING AN ESTATE PLAN IS A GIFT TO THE PEOPLE YOU LEAVE BEHIND.

HUNTSVILLE HOSPITAL FOUNDATION
Katherine Craine, CFRE | Executive Director

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CHARITABLE REGISTRATION NO. 89371 5292 RR0001

The Huntsville Hospital Foundation team can work with your legal team to explore Legacy Giving ideas and support.



The Huntsville Hospital Foundation Legacy Project

What is a legacy gift?

A legacy gift is a planned bequest that provides an opportunity to support a charitable organization that is meaningful to you.

What is the difference between a bequest and a beneficiary designation?

A bequest is a gift that you make through a will or trust. A beneficiary designation is a gift you make through a contract such as life insurance, investment accounts and retirement plans.

Who can leave a gift in their will to charity?

Anyone! It does not matter your age, assets or wealth and there is no minimum. Every bequest, of any size, is significant for the future of Huntsville Hospital.

Can I leave a gift in my will and still provide for my family?

Yes! We completely understand that this may be one of the most important considerations for you. Some people divide their estate into percentages, leaving a portion to each of their children, grandchildren, loved ones and another to their charity of choice. You may want to talk to your professional advisors regarding your estate plan. A gift in your will can provide relief from, and in some cases eliminate entirely, taxes on your estate.

Why is a gift in my will so meaningful?

This type of giving has the potential to impact not just one person, but a whole community. It's a wonderful opportunity to shape the future of your community.

Isn't it more important to donate now rather than later?

Both are important. Huntsville Hospital Foundation is grateful for all donors. A gift in your will is an extraordinary way to leave a legacy that will last for years to benefit future generations. It helps the hospital plan for the future.

How will my gift to Huntsville Hospital Foundation be used?

Your gift will be used to support patient care and provide state-of-the-art tools for medical professionals at Huntsville Hospital.

Why should I tell you about my decision?

We understand that choosing to make a gift in your will is personal and you certainly don't have to talk to us about it. If you do choose to let us know that Huntsville Hospital Foundation is in your will, it allows us the chance to speak to you directly to thank you and learn about your motivations for giving, so that we can do right by your extraordinary gift. It also allows us to include you as a member of the Legacy Society that comes with its unique benefits and inspires others as well.

Do I need to re-do my entire will to include my gift to Huntsville Hospital Foundation?

No! Even if your will has already been written, you can include Huntsville Hospital Foundation using a special legal clause called a *codicil*. A *codicil* is a piece of paper attached to your will that outlines the changes you'd like to make in the settling of your estate.

What if I change my mind?

You can change your mind at any time about your bequest. You can change your will or simply add a codicil to your will indicating the change in your wishes.

Will my bequest to Huntsville Hospital Foundation produce a charitable tax receipt?

As a registered charity, Huntsville Hospital Foundation will provide a charitable tax receipt to your estate. Depending on your circumstances, the receipt can help to offset taxes on your estate, and not take anything away from your heirs.

What is Huntsville Hospital Foundation legal name?

Our legal name is Huntsville District Memorial Hospital Foundation. We are also known as Huntsville Hospital Foundation.

What wording should I use to leave a gift to Huntsville Hospital Foundation?

Your lawyer or other professional adviser will help you with the wording of your legacy gift. Below are examples.

A gift to support The Huntsville Hospital Foundation when received:

I leave to the Huntsville Hospital Foundation, 4-100 Frank Miller Drive, Huntsville, ON P1H 1H7, or its successor, (state share or percentage of estate, a specific amount of money, the specific securities you wish to leave, or a specific item or items.) I direct this money be used as the Foundation chooses (or state program or area of work you wish to support.)

A gift to support The Huntsville Hospital Foundation in perpetuity:

I leave to the Huntsville Hospital Foundation, 4-100 Frank Miller Drive, Huntsville, ON P1H 1H7, or its successor, (state share or percentage of estate, a specific amount of money or the specific securities you wish to leave). I direct this money be kept and invested in perpetuity with income generated to support healthcare needs as the Foundation chooses (or state program or area of work you wish to support.)