

MAKING A DIFFERENCE

www.wheatlandhospice.ca | info@wheatlandhospice.ca | 403-934-8199

WITH LEGACY GIVING

REASONS TO GIVE

By leaving a legacy gift of any size to Wheatland & Area Hospice society, you can help us provide better rural palliative care for our family and friends, right here in our own community.

You can be assured that your legacy gift will be used effectively and efficiently to support the needs of our hospice. We know the importance of our loved ones to be less burdened by travel, to help prevent caregiver burnout, and to provide the best possible support at end of life.

If you would like to discuss leaving a gift or have questions, please contact us at info@wheatlandhospice.ca or 403-934-8199. Our Fundraising Director or Investment Director will promptly respond.

WAYS TO GIVE

Your legacy gift will ensure a profound and lasting impact in our community.

GIFTS IN YOUR WILL



Donation Goal	Donation Strategy
<p>By leaving a legacy gift to WAHS, you are making a promise to help shape our community and provide better end of life care.</p>	<p>Your lawyer and financial advisor can help you prepare a bequest to WAHS using the appropriate language and advise you about the best course of action to take.</p>
<p>Your support and generosity play a crucial role in enabling WAHS to provide quality care to patients and their families during their most vulnerable moments. It is a great way to leave a lasting legacy.</p>	<p>Already have a Will? It is a simple process to revise it to include a legacy bequest. Depending on the changes that you would like to make, it may be possible to use a codicil to make your arrangements.</p>

GIFTS OF SECURITIES

Donation Goal	Donation Strategy
<p>Donating publicly traded stocks, bonds, mutual funds, or other securities is a tax-smart way to support WAHS while enhancing your charitable gift.</p>	<p>By donating publicly traded securities, you eliminate the capital gains tax that would be payable if you were to first sell the stock, and then donate the proceeds. You also receive a charitable tax credit.</p>
	<p>Important: all gifts of publicly traded securities, either being gifted through your estate plan or if being donated today, should be designated directly to Wheatland & Area Hospice Society.</p>
	<p>For information about making a securities transfer to WAHS, your financial advisor and accountant can assist in the planning so that the full value of the appreciated investment is obtained.</p>
	<p>Alternatively, securities can be done online at CanadaHelps, a trusted source. A 2-3% processing fee will be deducted from disbursements.</p>

GIFTS OF RETIREMENT ASSETS

Donation Goal	Donation Strategy
<p>Depending on your investment portfolio, RRSPs and RRIFs can often be very heavily taxed when withdrawn or if left in your estate. WAHS could be named as the direct beneficiary of your RRSP/RRIF assets for taxable benefits to your estate.</p>	<p>This strategy would allow you to obtain full tax benefits without having to subject the funds to probate. You could simply gift WAHS your RRSP/RRIF proceeds through your Will. A donation tax receipt would then be used to offset taxes on your final tax return, and/or the year preceding.</p>

CHARITABLE FOUNDATIONS

Donation Goal	Donation Strategy
<p>A charitable giving foundation can be a cost-effective option and are often available through your financial institution or advisor. Annual grants are then provided to WAHS.</p>	<p>You receive an immediate charitable tax receipt for your initial contribution. Further contributions to the account results in tax credits in the year they are made, or can be carried forward for up to 5 years.</p>
<p>You can contribute cash, securities or other assets, RRSP/RRIF/TFSA to the foundation or consider naming the fund as the beneficiary of a life insurance policy.</p>	<p>Naming a successor to the account can create a legacy fund that you and your family can use as a lasting testament to what you value most.</p>

GIFTS OF LIFE INSURANCE POLICIES

Donation Goal	Donation Strategy
<p>Option One: Naming WAHS as your policy beneficiary.</p>	<p>This is most beneficial when your estate can benefit from a charitable donation receipt.</p>
<p>Option Two: Transfer of ownership of your life insurance policy to WAHS.</p>	<p>WAHS now owns the policy and is responsible for future premiums, if applicable. A donation receipt is issued based on the Fair Market Value of the policy at the date of transfer to WAHS. Medical and actuarial underwriting is required, and WAHS must ensure that no relative is interested in taking over your policy instead. Unfortunately, this option is currently not available at WAHS.</p>

OUR PROMISE TO YOU

With hope and hard work, anything is possible.

We will uphold your decision.

We value the importance of family and friends, and know that your loved ones will always come first. We recognize that circumstances often change over time, and that your decisions and estate planning might be amended in the future. We will always agree to whatever decisions you choose, and we know that all decisions made, will be made in your own time.

We will respect your privacy.

We recognize that your Will and estate plans are very personal to you. Any information that you choose to share with us regarding your legacy commitment will be kept in the strictest confidence.

We are very grateful for your generosity.

We acknowledge the paperwork and travails you may face as you do this good deed. Thank you from us, our community, and palliative patients, their families, and friends. It is a comfort to know we can count on each other through whatever life brings.

If you would like to discuss leaving a gift or have questions, please contact our Fundraising Director or Investment Director at info@wheatlandhospice.ca or 403-934-8199. They will respond promptly.

The information provided is general in nature and is not intended as a substitute for professional advice. WAHS encourages all donors who are planning a legacy gift to seek independent legal and financial council.

