

FOR MORE INFORMATION

I am interested in supporting health care in my community through a planned gift.

- Bequests
- Life Insurance Policy
- Marketable Securities
- Trusts
- In Memoriam Donations
- Other: _____

Name: _____

Address: _____

City/Prov: _____

Telephone: _____

Email: _____

- I am pleased to share that I have already made arrangements with the Walkerton & District Hospital Foundation in my will.



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GIVING *for the* FUTURE

PLANNING FUTURE DONATIONS
THROUGH CHARITABLE GIFTS



WHAT IS A CHARITABLE BEQUEST

A bequest, or a gift by will, is a donation to charity or Foundation explicitly stated in a person's will. It is a simple and easy way to make a planned gift to the Foundation, and a way to leave a lasting legacy or honour the memory of a loved one.

WHAT ARE THE BENEFITS?

CONVENIENT & SIMPLE

Can be made in any amount and is easy to arrange.

COST EFFECTIVE

There are no extra out-of-pocket costs.

TAX RELIEF

Effective way to reduce Estate taxes. Receipt will be made for the full value of your bequest.

FLEXIBLE

Can be a specific amount, a percentage or residue of your Estate.

HOW DO I MAKE A BEQUEST?

If you have already prepared your will, it is as simple as updating it with an additional paragraph with the help of a Codicil. A Codicil is a legal document that you can use to make changes to your current will.

If you do not have a will, we suggest you do so! A will is the first step to ensure that your intentions for your Estate are properly documented.

LIFE INSURANCE POLICIES

A planned gift can be made to the Foundation through a life insurance policy. A new policy can be created, or an existing policy can be transferred to the Foundation as owner/beneficiary. In both cases, immediate tax benefits will be realized.

MARKETABLE SECURITIES

A gift of stocks, bonds or mutual funds offer a partial exemption of taxation. The tax receipt, however, will be for the full fair market value of the securities on the day of transfer.

TRUSTS

Investing money or property in a trust is a special way to make a gift to your hospital, which in turn provides a source of lifetime income for the donor. The Foundation will receive the remainder of the investment after the donor has passed.

IN MEMORIAM GIFTS

In the unfortunate event of a loved one passing, WDHF can be designated as the recipient for a memorial gift in their honor. The Foundation will forward a card to the family of the individual who passed to show that a donation has been made. Memorial donations can be made through the funeral home or directly at the Foundation.

WHAT IS AN ENDOWMENT FUND

An Endowment Fund is essentially like an investment account set up to support a charity, foundation or non-profit institute. They are made up of cash, bonds, and other securities.

Endowment Funds can be established in your own name or in honour of a loved one.

HOW CAN I CONTRIBUTE?

- CASH OR CHEQUE
- APPRECIATED SECURITIES
- LIFE INSURANCE
- BEQUESTS IN YOUR WILL

RECOGNITION

The Foundation celebrates the generosity of our donors. All donations will be recognized according to the donor levels of giving. The Foundation also respects donors who wish for anonymity. We appreciate each and every donation made to the Foundation.

