

Leaving a Legacy of Hope



At Shriners Hospitals for Children® – Canada, it is the generosity of our donors that gives kids a chance to realize their dreams. Through our specialized services, innovative research and training, we help make these dreams come true every day.

You can be a part of these dreams well beyond your lifetime. By naming Shriners Hospitals for Children – Canada in your Will or by considering a planned gift of life insurance, RRSPs/RRIFs or securities, you can leave a legacy of hope and health for generations to come.



Hôpitaux Shriners
pour enfants®
Shriners Hospitals
for Children®
Canada

It's important to Have a Plan

When you donate to Shriners Hospitals for Children – Canada you can make a meaningful difference in the lives of countless children, either during your lifetime or through your Will.

You don't have to be wealthy to make a difference. With proper planning, a charitable bequest can reduce taxes owing upon death and ultimately will ensure that you maintain some control over the distribution of your estate.

Donor Recognition Programs:

Our donors are part of a unique group who believe that every child deserves a chance to realize their dreams.

If you are interested in making a gift to the Shriners Hospitals for Children – Canada, our Development Team can provide you and your legal and tax advisors with the information you require for your particular circumstances.

Planned Giving Basics

What is Planned Giving?

Planned Giving allows donors to realize their philanthropic goals, through current and/or future charitable gifts, while maximizing all personal, financial and tax considerations.

- Planned Giving often involves two basic giving methods:
 - Outright gifts of cash or other assets (e.g. stocks, bonds, mutual funds).
 - Deferred gifts, such as bequests by Will, RRSPs/RRIFs, or Life Insurance.

Gifts of Life Insurance

- Naming Shriners Hospitals for Children – Canada as the **beneficiary** of a new **or** existing policy
 - **Upon death** proceeds will pass outside of your estate, offering protection from estate administration taxes and the charitable tax credit will help to alleviate the tax burden.
- Making Shriners Hospitals for Children – Canada **owner** of a new **or** existing policy
 - If you donate a new or existing policy, **while you are alive**, you will receive a charitable tax receipt for any **cash** surrender value on the policy and for any future premiums that you pay.

Donations of RRSPs or RRIFs

- When Shriners Hospitals for Children – Canada is named as a **beneficiary** of your RRSP or RRIF,

proceeds are paid directly upon death.

- The charitable tax receipt will help to reduce estate administration taxes, as the funds will pass outside of the estate (** except in Quebec where Registered Retirement Plans can only be designated in a Will*)

Gifts of Securities

- Donating publicly traded securities, while you are **alive** or through an **estate**, will exempt you **or** your estate from paying tax on the capital gain triggered by the donation. You will also receive a charitable tax receipt for the **fair market value** of the gift, which is an exceptional way to support Shriners Hospitals for Children – Canada and to maximize your tax savings.

Bequests by Will

- Legacy bequests in a Will (specific \$ amount).
- Residual beneficiary designations (% or share of an estate)

Wills and Powers of Attorney should always be updated to reflect life event changes and to support your philanthropic goals. Your Executor has a legal obligation to follow your Will.

If charitable bequests are **not** clearly defined, it could **delay** the settlement of your estate and your charitable bequests might **not** be directed to where you want them to go.

Suggested Forms of Bequests

General Bequest

I give and bequeath to the Shriners Hospitals for Children – Canada the sum of _____ Dollars (\$_____) for the use and benefit of its hospital.

Bequest of Residue

I give and bequeath the entire residue of my estate to the Shriners Hospitals for Children – Canada for the use and benefit of its hospital.

Bequest of Percentage of Residue

I give and bequeath to the Shriners Hospitals for Children – Canada _____ percent of the residue of my estate (_____%) for the use and benefit of its hospital.

Always Seek Expert Advice

The information provided is solely for the interest of friends and donors to Shriners Hospitals for Children – Canada. However, Shriners Hospitals for Children – Canada is not a source of legal, tax or financial advice and should not be relied upon as a substitute for any professional advice.

Planned Giving Information Form

All Requests and Replies are at **No Obligation** and are for information only.

1. I would like some information on:

- ☐ How to include Shriners Hospitals for Children®– Canada in my Will
- ☐ Donor Recognition Programs
- ☐ How to make a gift now

2. Contact Information:

• Name:

First _____

Last _____

• Address

Street _____

City _____

Province _____

Postal Code _____

• Email: _____

• Phone:

Daytime _____

Evening _____

Charitable Bequests – The Benefits to You

Simple

A bequest is easy to arrange. Simply ask your lawyer to include a bequest to the Shriners Hospitals for Children® – Canada.

Tax Relief

A Charitable Bequest is an effective method to reduce taxes to your estate.

Tax Planning

Shriners Hospitals for Children – Canada will issue a tax receipt for the full value of your bequest when received.

Flexible

Your bequest can be for a specific amount (legacy); for a percentage of your estate; or for the estate residue.

Peace of Mind

You can make a change (codicil) to your Will anytime.

Convenient

A charitable bequest can be made for any amount you choose. Your bequest can be in the form of cash; securities (stocks, bonds, mutual funds), or through gifts of RRSPs/RRIFs and Life Insurance.

Memorialize

Your bequest can also symbolize a lasting memorial for you and your family.

Shriners Hospitals for Children® – Canada

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