

# A GIFT PLANNING *Guide*

## GUIDE TO GIFT PLANNING FOR THE FUTURE OF WDMH

Unfortunately, half of adult Canadians don't have a will. For your loved ones, one of the greatest things you can do is have your affairs in order. Having an up-to-date will is the only way to ensure your assets will be dispersed according to your wishes. Please consider your legacy and loved ones, and have a will made.

Our planned giving program offers a simple way to leave a lasting gift that will support the compassionate care of patients at WDMH well into the future. We will celebrate your generosity with membership to our [Society for Compassionate Care Forever](#), a group of caring individuals who understand the importance of our rural hospital in caring for our region's health care needs into the future. Participation in any public recognition benefits of the Society is your choice. The Society has several public and private recognition benefits, and your level of participation will be completely up to you.

*“You're more than a number at WDMH. You're treated with respect by staff who provide the highest level of care.”*

*~Vera Mitchell, Life Insurance Donor*



### *Resources you'll find on our website:*

- Please visit the gift-specific web pages on our website at [www.wdmhfoundation.ca](http://www.wdmhfoundation.ca) to learn more about making a planned gift to support WDMH.
- Resources: This page hosts all the resources provided in the [Plan Your Gift](#) section of the website.
  - [Your Best Gift Tax Savings Online Tool](#) (for gifts you want to make now or in your estate)
  - [Answering your Questions about Planned Gifts](#): Frequently asked and answered questions
  - [Sample Language for a Will or Bequest](#)
  - [Planned Gift Intention Form](#)
  - [Shares Donation Letter of Intent Form 1](#) and [Mutual Funds Donation Letter of Intent Form 2](#)
  - [KPMG Tax Information on Giving Securities](#)
- [For Professional Advisors](#): If you are supporting clients who would like to make a planned gift to benefit the Winchester District Memorial Hospital, take a look here for some great information and resources.
- [Society for Compassionate Care Forever](#): Learn more about how your planned gift can be recognized and appreciated, either privately or publicly.



## GETTING STARTED

Always visit a lawyer when determining your will and estate plan. First, ensure you have financial security for your lifetime. Second, ensure your family is taken care of. Then, consider charitable giving.

[1]

### COMPLETE A LIST OF ASSETS

Create a list of everything you own - your home, assets, vacation property, antiques and jewelry. Include your business interests and investments like RRSPs or RRIFs, segregated funds, stocks, and bonds, bank accounts and life insurance. Also choose an executor, and a guardian if you have young children.

[2]

### CONSIDER YOUR DREAMS

If you could do anything with your money, what would you do? How would you best help your family, or your community? Consider the people and organizations that have special meaning to you, and ask yourself what you would like your legacy to be.

[3]

### INCLUDE FAMILY AND PHILANTHROPY

Philanthropy is “the love of others.” By supporting the WDMH Foundation you are helping to create a better future for your community. Tell your family about your charitable giving to help them understand what is important to you, and let them share in the joy of philanthropy.

If now feels like the right time to plan your gift as a legacy for WDMH, we encourage you to discuss your interests with Erin Kapcala, the Manager of Major & Planned Giving. Erin will help you find answers to your questions, to suit your wishes and your personal, financial, and tax circumstances. Your questions and any information exchanged will be held in the strictest confidence.

*Thank you for honouring us by planning your gift for the future of WDMH.*

TALK WITH YOUR FAMILY. TALK WITH YOUR ADVISOR. TALK WITH US.



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Please note that the information included in this fact sheet is not intended as legal, financial or tax planning advice. When considering any planned gift, you should always consult professionals and your family (as preferred).