



Please note: the below sample clauses are provided as examples only to assist you in preparing a will. **As these clauses do not provide a substitute for professional advice and counsel, we suggest you take these samples with you when seeking advice from your lawyer, accountant, and/or financial planner. Please consult your legal professional to ensure that your wishes are met within your will.**

**General bequests:** legacies that come from the general value of one’s estate and are made by designating a specific cash amount, particular asset (property, shares, RRSPs, RRIFs, or other valuable item) or a percentage of one’s estate to the WDMH Foundation.

**GIFT UNRESTRICTED:**

“I give, devise and bequeath to the WDMH Foundation the sum of \$\_\_\_\_\_ (or \_\_\_ specific asset\_\_\_, or \_\_\_ percent or the residue of my estate) to be used for any purpose(s) approved by the Board of Directors of the WDMH Foundation (566 Louise Street, Winchester, Ontario K0C 2K0).

**Specific bequests:** legacies which specify the purpose for which a particular gift is to be used. (i.e., designated to a certain fund\* at the Winchester District Memorial Hospital (WDMH)).

**GIFT RESTRICTED:**

“I give, devise and bequeath to the WDMH Foundation the sum of \$\_\_\_\_\_ (or \_\_\_ specific asset\_\_\_, or \_\_\_ percent or the residue of my estate) to be used specifically for the (specify fund) of the WDMH Foundation (566 Louise Street, Winchester, Ontario K0C 2K0). If at the time of my death it is impossible, impractical or inadvisable to apply the gift to this purpose, the gift may be used for any purpose(s) approved by the Board of Directors of the WDMH Foundation.”

\* a listing of available funds is on page 4.

**Residual bequests:** made when you intend to leave the residue portion (any leftover property) of your assets after other terms of the will have been satisfied.

### RESIDUAL CONTINGENT TRUST, GIFT UNRESTRICTED:

Upon the death of my surviving (wife, husband, etc.) \_\_\_\_\_, I direct my trustee to transfer and deliver the balance of the residue of my Estate, including any undistributed income to the WDMH Foundation to be used for any purpose(s) approved by the Board of Directors of the WDMH Foundation.

**Contingency bequests:** allow you to leave the portion of your estate previously benefiting another to the WDMH Foundation if that named beneficiary does not survive you.

### CONTINGENCY, GIFT UNRESTRICTED:

If any of the beneficiaries named in this will should die before becoming entitled to receive their distributive share of my estate, I give or transfer to the WDMH Foundation the share to which such other beneficiary would otherwise have been entitled, to be used for any purpose(s) approved by the Board of Directors of the WDMH Foundation.

**Power to Vary Purposes:** The following sample clause is designed to empower the WDMH Foundation's Board of Directors with the ability to vary the purposes for which the gift is used ONLY if circumstances make it impossible or impractical to carry out the original purposes.

**It is recommended that this clause be included wherever a designated use is specified.**

If in the opinion of the Board of Directors of the WDMH Foundation (hereafter the Directors) it should become impossible, inadvisable or impractical to apply the said gift for the said purpose or if the Directors are of the opinion that part of the gift is not required for such purpose, the Directors shall use my gift or such part thereof in such a manner as, in its discretion, may be to the hospital's best advantage for other purposes consistent with the spirit and intention of the gift.

You may wish to discuss the terms of the bequest with a representative of the WDMH Foundation, particularly when you wish to designate its use, to ensure that your wishes can be fulfilled. Once your will is completed, we would appreciate receiving a copy of the clause pertaining to your bequest to the WDMH Foundation to keep on file for future reference. All information will be held in strictest confidence.

\* a listing of available funds is on page 4.

**Codicil:** an instruction that is added to a will after the main part of the will has been written.

### SAMPLE CODICIL:

I give, devise, and bequeath [choose one of the following]: (\$ \_\_\_\_\_, \_\_\_\_\_% of the residual of my estate, \_\_\_\_\_% of my RRSPs or RRIFs, \_\_\_\_\_ shares of \_\_\_\_\_, \_\_\_\_\_% of my real property known as \_\_\_\_\_) to the WDMH Foundation, a Canadian charity with Registration #89282 4368 RR0001, for its charitable uses and purposes, as determined by the WDMH Foundation Board of Directors.

In all other respects I ratify and confirm all of the provisions of my said last Will and Testament dated on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

IN WITNESS WHEREOF, I sign, publish and declare this instrument to be a Codicil to my last Will and Testament in the presence of both persons witnessing said Codicil at my request this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_ residing at \_\_\_\_\_  
(name) (full civic address)

#### Witnesses

\_\_\_\_\_ residing at \_\_\_\_\_  
(name) (full civic address)

\_\_\_\_\_ residing at \_\_\_\_\_  
(name) (full civic address)

Please note: The codicil, to be valid, must be signed in the presence of both witnesses who are present at the same time as the testator, neither of whom are a beneficiary under the terms of the will, and the original codicil placed with your original will. If you like, a copy of this can go to your lawyer and a copy to the WDMH Foundation.

\* a listing of available funds is on page 4.

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).



\* Foundation Funds supporting a **variety of local health care**:

- “Health Care Undesignated Fund” (to support the highest priority needs at either WDMH or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time of the gift).

\* Foundation Funds supporting **the Dundas Manor** include:

- the “New Dundas Manor (Redevelopment) Fund” (to support the redevelopment of the new Dundas Manor);

\* Foundation Funds **supporting WDMH** include:

- the “Family Care Fund” (Supporting care for all families just like yours. Where your gift is needed most);
- the General Equipment Fund (solely in support of the purchase of medical equipment);
- the “Cancer Care Fund” (to support patient care and medical equipment purchases related to cancer);
- the “Ophthalmology Fund” (Supporting patient care and equipment purchases for patients with ophthalmological diagnoses & treatments);
- and the “Building and Renovations Fund” (Supports the physical building of the hospital, whether it be a renovation or a new build).