

A legacy for care close to home



The WDMH Foundation: Legacy Giving for the Future of Care Close to Home

Excellent, local health care is a team effort. In our community it involves donors, the WDMH Foundation, Winchester District Memorial Hospital, and Dundas Manor Long-Term Care Home. It's been a successful one for years. Let's keep caring!

We fundraise – for both current and future needs – to ensure excellent care at both Winchester District Memorial Hospital and Dundas Manor. Together, these two organizations care for people from Dundas, Stormont, Glengarry, Grenville, Prescott-Russell, parts of the city of Ottawa and beyond.

The WDMH Foundation's commitment is simple:

- Together with current and future donors who – like us – value excellence in local health care, we work to inspire and support their investments of time and financial gifts.
- We work hard to ensure that our donors trust us, feel our gratitude, are well-informed, and enjoy positive giving experiences. In all things, our donors are #1.
- We value accountability, transparency, integrity – and celebrating our donors' achievements and successes along the way.

Gifts of Shares, Securities, Mutual Funds, and Other Investments

Gifting Shares, Securities, and Mutual Funds

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to the WDMH Foundation you can avoid taxes and make a significant gift at the same time.

Benefits for you:

1. **Opportunity** – The chance to make a significant gift.
2. **Tax Advantages** – You can eliminate some or all the tax on capital gains and receive an official charitable income tax receipt for the amount at which the shares are valued when they settle into the WDMH Foundation's account.
3. **Simple and Convenient** – Securities are easy to transfer. We will provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to that of the WDMH Foundation.
4. **Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

A charitable income tax receipt is issued for the amount at which the shares are valued when they settle into the WDMH Foundation's account. You must have your broker transfer the securities to the WDMH Foundation. The gift will not qualify for the elimination of capital gains if the securities are sold, and the cash then gifted to the WDMH Foundation.



Gifts Registered Funds

Donating registered assets such as a Registered Retirement Savings Plan (RRSP), a Registered Retirement Income Fund (RRIF) or a Tax Free Savings Account (TFSA) allows you to create a legacy for the WDMH Foundation – once your needs and those of your loved ones have been met. Donating all or part of an RRSP, RRIF or TFSA is an effective way to reduce the taxes payable by your estate. If you leave your RRSP, RRIF or TFSA to the WDMH Foundation, your estate will receive a charitable income tax receipt for the entire amount received.

Benefits for you:

- 1. Tax Advantages** – A tax-effective means of donating. And your estate will receive a charitable income tax receipt for the amount of your gift.
- 2. Control** – You retain the use of the investment.
- 3. Simple** – Simply ask your financial advisor/financial institution to change the beneficiary designation to the WDMH Foundation or include your intent in your Will.
- 4. Flexible** – The designation is revocable by you at any time.
- 5. Cost Effective** – There are no extra out-of-pocket costs.
- 6. Peace of Mind** – You can arrange your gift and know it will occur just as planned.

- 7. Memorialize** – You can create a lasting legacy for you, your family or anyone you may wish to honor.
- 8. Opportunity** – A chance to make a significant gift.
- 9. Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

There are two ways to make your donation:

- 1.** You can name the WDMH Foundation as the direct beneficiary to all or part of your investment. Upon your passing, the proceeds will be paid directly to the WDMH Foundation.
- 2.** You can name your estate as the beneficiary of your RRSP, RRIF or TFSA and leave instructions in your Will to donate all or part to the WDMH Foundation. You may specify a percentage of the investment to be gifted or a specific dollar amount. Your estate will receive a charitable income tax receipt – which can help offset your taxes for the year of your passing and the previous year.

Donors always have the choice to choose where their gift will be directed. Please see our **WDMH Foundation Funds** – or reach out to us.

The Society of Care: Welcome to the Family

All donors who make a legacy gift to the WDMH Foundation are welcomed into our *Society of Care*. This society is our way of honouring and expressing our gratitude for your generosity and commitment to local health care. Your wishes will always be respected, and you decide if your acknowledgement and recognition will be private or public.

Society of Care members are offered recognition on either the Winchester District Memorial Hospital or Dundas Manor's Legacy Giving Wall. You can also receive recognition in our annual report.

Best of all you have a life-long association and contact with the WDMH Foundation (in agreed-upon ways). Better still, you become part of the society!

Society of Care membership is not mandatory, and all details of your gift are strictly confidential, unless you give permission for your gift and story to be shared.

Community. Care. Close to Home.

For more information about legacy gifts, please contact us.

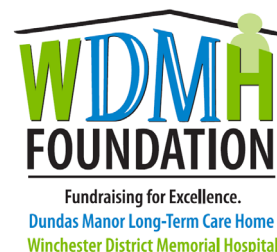
Erin Kapcala, Manager of Major and Planned Giving

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Or just drop in at our office in the hospital lobby!

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Charitable Registration Number: 89282 4368 RR0001



This information, obtained from various sources, is believed to be reliable, but its accuracy cannot be guaranteed. This information is not intended as legal, financial or tax planning advice. When considering any planned gift, you should always consult your professional advisors to determine the applicability for your specific circumstances. Rules relating to taxes sometimes change, and it is best to reach out to the WDMH Foundation and to your financial advisor to confirm current charitable tax benefits.