

## WILLS AND BEQUESTS

**Our Legal Name and Charitable Registration Number are:  
St. Joseph's Health Centre Foundation 11918 3382 RR0001**

We are grateful that you are considering St. Joseph's Health Centre Foundation in your will. A bequest is the most common way to make a planned gift. It is also a perfect way for you to pay tribute to the great care you or a loved one has received at St. Joseph's Health Centre. When you create a legacy with a gift in will, you are ensuring a strong future for healthcare in the west-end community, for generations to come.

A carefully prepared will can help make sure all reasonable provisions have been made for your dependents first. Once loved ones are taken care of, your will can incorporate your own passions and values for how you'd like to make a difference for the health of family, friends, and neighbours.

Bequests can be in the form of cash, real estate, stocks, bonds, other securities, tangible personal property or other assets. Here are some types of bequests that can be made to St. Joseph's Health Centre Foundation, as examples:

### **Specific Bequest:**

St. Joseph's Health Centre Foundation would receive a specific dollar (\$) amount from your estate, or a stated item or property.

**Residual Bequest:** St. Joseph's Health Centre Foundation would receive a percentage (%) or all of the remainder of your estate. The actual value is sensitive to any changes in the value of your estate.

### **Bequest Benefits for Your Estate Taxes**

St. Joseph's Health Centre Foundation will issue a charitable tax receipt for the full amount of the gift when it comes to fruition. This can result in significant tax advantages for your estate, depending on your personal financial situation.

If your gift is more than 100% of your final year's income, the remaining amount can be carried back to a previous year provided there was charitable donation room available.

### **Sample Will Clausings:**

Here is some suggested language to provide for St. Joseph's Health Centre Foundation in your will:

#### **Unrestricted bequests**

*I give to St. Joseph's Health Centre Foundation, currently located at 30 The Queensway Toronto, Ontario **{percentage of residue or specific dollar amount}** of my estate. It is my wish that these funds, if practical and possible, support the priorities of St. Joseph's Health Centre, as determined by the St. Joseph's Health Centre Foundation's Board of Directors.*

#### **Restricted bequests**

*I give to St. Joseph's Health Centre Foundation, currently located at 30 The Queensway Toronto, Ontario **{percentage of residue or specific dollar amount}** of my estate. It is my wish that these funds, if practical and possible, support the **{hospital program or department}** priorities as determined by the St. Joseph's Health Centre Foundation's Board of Directors.*

Disclaimer: The content in this document and sample clausings is provided for general info purposes only and does not constitute legal or other professional advice. Donors are advised to seek their own legal counsel regarding will writing and any specific legal issues.

For more information, please contact:

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