

A hospital is truly the cornerstone of a community. It's where precious lives are saved. It's a place we all can count on. Having the very best medical equipment, expertise and compassionate care close to home is a priceless gift that's only possible with your caring support. By including Bruce Peninsula Hospitals Foundation in your Will, you can have a significant impact on the quality and accessibility of healthcare for your family, friends & neighbours on the Peninsula.

WHAT IS A CHARITABLE BEQUEST?

A bequest or gift by Will is the simplest and most popular way of making a planned gift to the Foundation. It is a convenient and effective way for you to leave a lasting legacy or honor the memory of a loved one. A bequest also ensures that our health care professionals are able to continue to provide the best care to their patients for generations to come.

WHAT ARE THE BENEFITS?

- Convenient:** A charitable bequest can be made no matter how old you are and in any amount you want.
- Simple:** A bequest is easy to arrange. Simply instruct your lawyer to include a bequest to the Foundation in your Will, or in a Codicil to your Will.
- Cost-Effective:** There are no extra out-of-pocket costs. Your present income will not decrease.
- Tax Relief:** A charitable bequest is a highly effective way to reduce Estate taxes. The Foundation will issue a charitable tax receipt for the full value of your bequest. This receipt will be used to reduce the tax payable on your final tax return. If your bequest exceeds 100% of your net income, the excess may be carried back to the previous tax year.
- Flexible:** Your bequest can be for a specific amount, a percentage of your Estate, or the residue of your Estate (a gift after your debts, taxes and specific legacies have been paid).
- Peace of Mind:** You retain use of all your assets during your lifetime. Make changes to your Will at any time.

Making a bequest is simple. If you have already prepared your Will, you can update it with a Codicil, a supplementary paragraph added to your present Will, describing your gift intentions. If you have not yet prepared a Will, we recommend you do so! This is an important "first step" to ensure that your intentions for your Estate are documented and that your family and loved ones will be properly cared for.

You may make a specific bequest, which means that you designate a specified amount to the Foundation; or you may make a residual bequest, which means that you designate all or a percentage of the remaining portion of the Estate to the Foundation after specific legacies, debts, taxes, and administrative



Examples of language you might consider for leaving a bequest to BPH Foundation.

UNRESTRICTED USE - RESIDUAL BEQUEST:

Pay or transfer to Bruce Peninsula Hospitals Foundation, the whole of the residue (or a percentage of the residue) of my Estate to be used for the benefit of the Foundation as its Board of Directors may determine from time to time.

PRECATORY:

Pay to Bruce Peninsula Hospitals Foundation, the sum of \$..... Without imposing any restrictions upon this bequest, it is my wish that it be used for..... under the direction of the Board of Directors of the Foundation.

ENDOWMENT - SPECIFIC BEQUEST:

Pay to Bruce Peninsula Hospitals Foundation, the sum of \$..... to be permanently endowed as part of the Foundation's Caring for Tomorrow Endowment Fund, with a portion of the annual income used at the direction of the Board of Directors of the Foundation.

RESTRICTED USE - SPECIFIC BEQUEST:

Pay to Bruce Peninsula Hospitals Foundation, the sum of \$..... to support the medical equipment needs of (Warton Hospital / Lion's Head Hospital) as its Board of Directors may determine from time to time.

UNRESTRICTED USE - GIFT OF TANGIBLE PROPERTY:

Transfer and deliver to Bruce Peninsula Hospitals Foundation, (1,000 shares of Bell Canada Enterprises (BCE)) in kind, to be used for the benefit of the Foundation as its Board of Directors may determine from time to time.

ABOUT US

Bruce Peninsula Hospitals Foundation was incorporated in 1997. We strive to provide our physicians, nurses and technologists with up-to-date diagnostic and medical equipment to care for patients. With this ongoing challenge, our mission is to assist in meeting the health care needs of residents and visitors to the Bruce Peninsula by raising funds for priority hospital projects.

Our fundraising efforts support Grey Bruce Health Services' Lion's Head Hospital, Warton Hospital and our regional hospital in Owen Sound. With your generosity we can keep great health care close to home!



BRUCE PENINSULA HOSPITALS FOUNDATION

369 Mary Street, Warton, ON N0H 2T0
Charitable Registration # 88928 8049 RR0001

Web: www.bphfoundation.com
Facebook: [@bphsfoundation](https://www.facebook.com/bphsfoundation)

April Patry, Executive Director

T: 519-534-5856

E: apatry@bphfoundation.com

Willard VanderPloeg, Charitable Giving Advisor

T: 519-376-2121 x2736

E: wvanderploeg@bphfoundation.com

This information provides a brief overview on planning a gift to Bruce Peninsula Hospitals Foundation. The information is general in nature and is subject to change according to individual circumstances. You should always consult your own professional advisors for detailed information tailored to your own situation and to confirm applicable tax benefits.