

## Donation Policy

Thank you for your interest in and support of Hospice Calgary. We are successful because of donors like you who believe in our mission and want to help us ensure a strong financial future.

Hospice Calgary accepts designated and undesignated gifts.

Our legal name is **Hospice Calgary Society**. It is important that you and/or your attorney have our charitable registration number for your records. That number is: 118963669 RR0001.

We want to work with you to develop an appropriate acknowledgement of your gift. With your permission, we will include your name for public display on our Donor Wall. If you wish to remain anonymous, we respect your wish but would appreciate notification of your intentions.

Suggested wording you could use in your Will for an undesignated gift:

*"I hereby give Hospice Calgary Society, (Charitable Registration #118963669 RR0001), located at 1245 70 Avenue SE, Calgary, AB, Canada T2H 2X8, the sum of \$XXX dollars (or %XX) of my estate, or property herein described, to be used as the Board of Directors deem advisable for the benefit of Hospice Calgary."*

## Your Legacy

**The plans you make today help define your legacy and ensure that your wishes are carried out.**

A planned gift provides an opportunity for you to help shape and sustain the future vision of an organization that you already support today.

By making a gift for the future you are helping families in our care feel supported today.

We invite you to begin a conversation about planned giving with us. Please contact us to learn more.

Sincerely,

**Patricia Lee**  
Director of Development  
Hospice Calgary  
Email: [pat.lee@hospicecalgary.ca](mailto:pat.lee@hospicecalgary.ca)  
403-263-4525

Thank You!

### Hospice Calgary

Planned Giving Program

403-263-4525

[info@hospicecalgary.ca](mailto:info@hospicecalgary.ca)

[hospicecalgary.ca](http://hospicecalgary.ca)

Charitable Registration #

118963669 RR0001

## Your Legacy

A Gift for the Future



Sage Centre &  
Rosedale Hospice  
[hospicecalgary.ca](http://hospicecalgary.ca)

# Your gift makes a difference

At Hospice Calgary, we receive planned gifts from people who have made a choice to help others in our community. Gifts from our donors, small or large, allow us to guide children, teens, adults and families as they face advanced illness or the death of someone close to them. Your donation supports them in this very challenging time.

It surprises many to know that in most instances, the following planning options will allow them to make a larger gift than ever thought possible:

- Bequesting a Gift through a Will
- Beneficiary Designation through Life Insurance Policy or Retirement Plan
- Gift of Securities

We have outlined the distinct aspects of each option in this brochure. The option(s) you choose depends on your unique circumstances and financial objectives. **Please consult your financial advisor or lawyer for specific advise in choosing the best option for you and your family.**

## Bequest a Gift through your Will

After making provisions for those people close to you, you may also choose to include a charity in your will. A bequest often means you can make a much larger gift than you ever thought possible during your lifetime. You have use of the asset while you are alive and it is revocable if your financial circumstances change.

A bequest gift can be made to us by naming Hospice Calgary Society (our legal name) as an estate beneficiary. Bequest gifts can be made specific, residual, or as a gift of property.

### What type of bequest is right for you?

**Specific bequest** is a gift of money or property.

**Residual bequest** is a gift that comes from what is left in your estate once all other debts, taxes, beneficiaries and expenses are paid.

A **gift of property** can include publicly traded securities, real estate, art or other objects of value.

## Life Insurance and RSP's

Through your life insurance policy, RRSP or RRIF you can name Hospice Calgary Society as a beneficiary.

This allows you the opportunity to give a larger gift while having modest premium payments over a period of time.

### Types of Life Insurance Policies

**Existing, Paid-up Policy:** you can designate Hospice Calgary as the owner and beneficiary.

**Retain Ownership of a Policy:** by naming Hospice Calgary as the beneficiary in your Will.

**New Policy:** if you have a new policy and name Hospice Calgary as the owner, you will receive a tax receipt for the full amount of the premiums you pay.

For most Canadians, registered retirement funds are an important investment. RSP's allow you to defer taxes until withdrawn. Upon death, the entire remaining value of the RSP or RIF is considered income and is fully taxed. By naming Hospice Calgary as the beneficiary, the tax credit offsets the tax owing on the distribution of the fund.

## Gift of Securities

Securities can be an immediate gift to Hospice Calgary, or can be a part of your estate planning. A gift of publicly traded shares receives a 100% tax credit on the capital gains of the shares. This results in a larger tax savings than if you sold them and donated the proceeds.

