



Common
Legacy
Gifts

Gift
FAQs

Forms
& Gift
Language

LEGACY GIVING



FRASER VALLEY HEALTH CARE
FOUNDATION

YOUR HOSPITAL YOUR COMMUNITY YOUR FOUNDATION

Your Hospital. Your Community. Your Foundation.

The Hospital is our Community's life support system. From emergency care, to routine treatments, to helping bring new life into the world – we rely on the hospitals for our many aspects of our life.

What kind of health care do we want ?

A Legacy Gift shows great passion for supporting the charities close to your heart. Perhaps you received excellent care at our hospital and want to express gratitude; maybe want to give back to the community; or possibly you want to realize the tax benefits that a charitable gift can provide to you and your estate. Whatever your reason, a gift in your Will is a thoughtful investment your hospital.

Leave a Legacy

Find out how you can create a lasting health care legacy for generations to come and about tax wise giving that makes a difference today.

The size of gift you leave is completely your choice and will be greatly appreciated and well invested in the future of your community.

Together, we can ensure that our hospitals have the resources needed to continue to provide the very best health care well into the future.



Resource Guide

This guide includes:

- Common ways to make Legacy Gifts
- Legacy Gift FAQ's
- Components of a Good Estate Plan
- Publicly Traded Securities Donation Form
- Sample Language (*Hospital Specific*)

For more information please visit:

fvhcf.ca/legacygiving

Robert Beischer, Fund Development

robert.beischer@fraserhealth.ca

Tel: 1-877-661-0314

Common Ways to make Legacy Gifts

The following are some common legacy giving options.

Please obtain advice from your independent financial advisor, account or lawyer in regard to your estate.

Bequest

A simple way to make a gift is through a gift (or bequest) in your Will. You can specify a dollar amount, a particular asset, real estate, or a portion of your overall estate. You don't have to have a vast estate to make a bequest. Any value can be given.

Will wording is simple, you can choose which hospital your Legacy Gift will support Abbotsford Regional Hospital, Chilliwack General Hospital, Mission Memorial Hospital, or Fraser Canyon Hospital. For a sample of how to do this please see the ***Sample Wording Forms*** in this guide.

Publicly Traded Securities

Gifts of publicly traded securities can include shares, bonds and mutual funds. Please have your broker call us at 1-877-661-0314 to advise us of your securities donation. We will provide the brokerage account information and answer any questions. See the securities donation form in this guide.



Legacy Giving FAQ

Here are some of the most common questions and their answers.



What is a bequest to the Fraser Valley Health Care Foundation?

A bequest is the act of giving a gift in your Will to the Foundation.

Do I need to disclose details about my bequest?

No. You don't have to disclose any details about your bequest to the Foundation. However, it would help us in planning for future needs.

What name should you include in your Will to make a bequest to the Fraser Valley Health Care Foundation?

The name you should include in your Will to make a bequest is the **Fraser Valley Health Care Foundation**. The foundation is the charity which raises money for the following: Abbotsford Regional Hospital, Chilliwack General Hospital, Mission Memorial Hospital and, Fraser Canyon Hospital.

How can I ensure my gift is designated to the hospital most important to me?

Your gift can be directed to a specific Hospital. We can provide you with the appropriate wording to help ensure your gift is used as you wished. See sample wording.

What is the Fraser Valley Health Care Foundation Charitable Business Number?

87115 6724 RR0001



LEGACY GIVING

**YOUR HOSPITAL
YOUR COMMUNITY
YOUR FOUNDATION**

What assets can I use to make a gift ?

Generally speaking, during your lifetime you can make an outright gift of cash, securities or other property (e.g. real estate, personal property) through your Will or with a distribution from a RRSP/RRIF.

What sort of legacy gift also returns income to me?

A charitable gift annuity allows you to make a gift that also returns income to you, your spouse, or other individuals of your choosing. This may be attractive to you if you are a conservative investor 65 years of age or older.

What tax deduction will I receive for my gift?

Your tax benefits will depend on several factors: the type of gift, its timing, whether it is outright or deferred or has any income payments. In general, though, here are some guidelines:

- Outright gifts to the Foundation generate a charitable tax credit. In general, annual

donations in excess of \$200 will receive a tax credit of approximately 46 cents for each dollar donated (Subject to CRA rules and changes). Outright gifts of appreciated securities or mutual funds are receipted at fair market value, with no recognition of capital gains - a great tax benefit!

- Charitable bequests made through your Will are deemed to be made in the year of death and can be claimed on your final tax return.

If I make a legacy gift, will you continue to ask me for annual contributions?

Your gift is a significant addition to our long-term financial strength and our ability to meet the challenges and opportunities the future will bring. However, today's efforts are supported through annual gifts and we greatly appreciate and encourage any continued annual support you may want to consider.

As the greatest needs of our Hospitals are, constantly changing we will work with you to ensure your wishes are met while insuring that your gift will be used in the best way to benefit your hospital.





Donation Form for Publicly Traded Securities

Donor's Account Institution Information

Company Name _____

Contact Name _____

Street Address _____

City _____ Prov _____ Postal Code _____

Phone _____

Fax _____

Email _____

Account No. of Donor _____

Thank you very much for your generosity in considering a gift of publicly listed securities to the Fraser Valley Health Care Foundation.

Please follow these easy steps to affect the transfer of your shares or mutual fund units to the Fraser Valley Health Care Foundation in electronic form:

Step 1

- **Complete this form** with the help of your investment advisor.

Step 2

- **Fax this form** to the attention of our investment counsel at 604.870.7171 • Email: mark.siemens@rbc.com
- **Copy by fax** to the Fraser Valley Health Care Foundation at 604.851.4898 • Email: info@fvhcf.ca

Step 3

- **A tax receipt will be issued** by the Fraser Valley Health Care Foundation for the average of the high and low trading prices of the securities on the date that they are received in our account.
- **NOTE:** it can take up to a few days, or weeks in the case of mutual funds, for the transfer to be completed.

Options

- Please designate my gift towards the greatest need. .
- I would like the funds to be used for:
- _____

Questions?

Please call the Fraser Valley Health Care Foundation at 604.851.4890 or toll-free at 1.877.661.0314

Thank you very much for your support of the Fraser Valley Health Care Foundation

Charitable business number:
87115 6725 RR0001

WWW.FVHCF.CA

Donor's Information

Donor _____

Street Address _____

City _____ Prov _____ Postal Code _____

Phone _____

Email _____

I hereby authorize and direct the transfer in kind of the following securities from the above noted account to RBC Dominion Securities (FINS # T0002; Dealer: 9190; CUID: DOMA; DTC: 5002) for credit to: **Account #808-23011-13 : Fraser Valley Health Care Foundation**

Security Description	CUSIP/ISIS/ SECOL#	# of shares/ units

Authorization of Donor:

Signature _____ day / month / year

Please fax competed form to:

RBC Dominion Securities

Attn: Mark Siemens

301-2001 McCallum Road, Abbotsford, BC V2S 3N5

Phone: 604.870.7227 • Fax: 604.870.7171

Email: mark.siemens@rbc.com

Cc: Fraser Valley Health Care Foundation

Fax: 604.851.4898 • **Email:** info@FVHCF.ca



LEGACY GIVING

**YOUR HOSPITAL
YOUR COMMUNITY
YOUR FOUNDATION**

Sample Bequest Wordings

If you name Fraser Valley Health Care Foundation in your will, please let us know. It helps us plan for the future and to recognise your generosity.

Please contact Robert Beischer at 1-877-661-0314 or at robert.beischer@fraserhealth.ca.

As the greatest needs of our Hospitals are, constantly changing we will work with you to ensure your wishes are met while insuring that your gift will be used in the best way to benefit your hospital.

You can choose to support a specific Hospital's greatest need:

ABBOTSFORD REGIONAL HOSPITAL

CHILLIWACK GENERAL HOSPITAL

MISSION MEMORIAL HOSPITAL

FRASER CANYON HOSPITAL

Legacy Bequest:

"My estate trustees shall pay the sum of \$ _____ (or transfer assets with an equal value) to the **Fraser Valley Health Care Foundation** for the purpose of supporting the highest priority needs at ***INSERT HOSPITAL NAME.***"

Residual Bequest:

"My estate trustees shall pay _____% of the residue of my estate to the **Fraser Valley Health Care Foundation** for the purpose of supporting the highest priority needs as determined by the Foundation in consultation with ***INSERT HOSPITAL NAME***"

Legal Name:

As the official fundraising arm of the hospital, the name you should include in your will to make a bequest to your hospital of choice is "**Fraser Valley Health Care Foundation**".

The Foundation is responsible for raising money and performing estate administration on behalf of the Hospital.

Charitable Business Number: 871156725RR0001

Address:

Fraser Valley Health Care Foundation

32900 Marshall Road

Abbotsford BC V2C 0C2

Telephone: 1 877 661 0314 **Fax:** 604 851 4898

E-mail: info@fvhcf.ca



YOUR HOSPITAL YOUR COMMUNITY YOUR FOUNDATION

Create a lasting health care legacy for generations to come.

Fraser Valley Health Care Foundation was established in April 2000 to build partnerships with individuals, local organizations and businesses to support local health care services with in the Fraser Valley Regional Hospital District.

Our Hospitals

Abbotsford Regional Hospital

Chilliwack General Hospital

Mission Memorial Hospital

Fraser Canyon Hospital

Our Vision

To improve the quality of health care for our local communities.

Our Mission Statement

Fraser Valley Health Care Foundation works within your community to support the local hospital, facilities and programs run by Fraser Health

Mailing Address

Fraser Valley Health Care Foundation
32900 Marshall Rd
Abbotsford, BC
V2S 0C2

Charitable Registration Number: 87115 6725 RR0001



LEGACY GIVING

**YOUR HOSPITAL
YOUR COMMUNITY
YOUR FOUNDATION**