

LEGACY GIVING

RESOURCE GUIDE



Find out how you can
create a lasting health
care legacy for
generations to come.



Your Hospital. Your Community. Your Legacy.



The hospital is at the heart of our community. From emergency care, to routine treatments, to helping bring new life into the world, we rely on it throughout every stage of life.

Leave a Legacy

A legacy gift is a meaningful way to support the hospital you care about through a gift in your Will. It is a lasting investment in local health care that continues to benefit patients and families for generations to come.

Whether large or small, every gift makes a difference and helps ensure our hospital has the resources it needs well into the future.

Why People Give

There are many reasons people choose to leave a legacy gift, including:

- Expressing gratitude for care received
- Giving back to the community
- Creating a lasting impact on local health care
- Exploring tax-wise giving as part of estate planning

A Gift That Matters

Your gift is entirely your choice, and any amount is deeply appreciated. Legacy gifts are carefully invested to support the areas of greatest need in our hospitals and health care services. Together, we can help ensure high-quality care continues for generations to come.

This care is what keeps our families healthy and our community strong.

What kind of health care do we want to leave our children and grandchildren?

Learn More

fvhcf.ca/legacygiving

Contact

Jennifer Menge

Director of Philanthropy

1-877-661-0314

jennifer.menge@fraserhealth.ca

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 (Gift in Your Will)

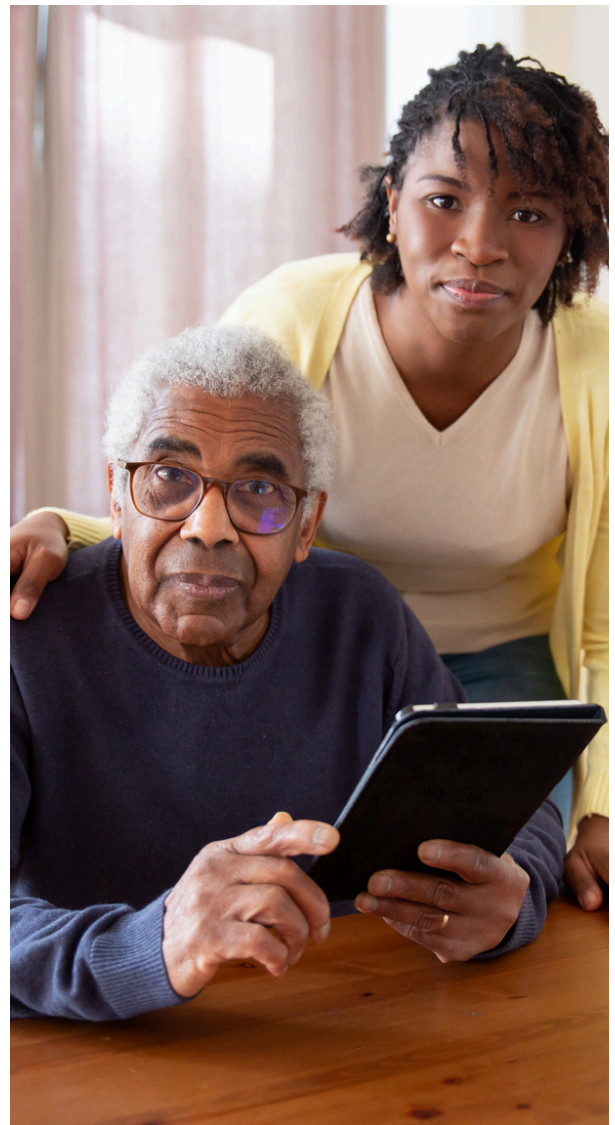
A simple way to make a gift is through a gift (or bequest) in your Will. You can specify a dollar amount, a particular asset, real estate, or a portion of your overall estate. You don't have to have a vast estate to make a bequest. Any value can be given.

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 resource 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 Frequently Asked Questions

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 enormously in planning for the future capital needs and clinical programs.

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 hospitals in the eastern Fraser Valley (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 appropriate bequest wording to help ensure your gift is used as you wished. See sample wording.

What is your charitable business number?

87115 6724 RR0001

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, your gift can be designated to the Fraser Valley Health Care Foundation in accordance with your wishes.

Legacy Giving Frequently Asked Questions

What sort of legacy gift also returns income to me?

A charitable gift annuity allows you to make a gift to the Foundation 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.

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

Your legacy gift is a meaningful contribution to the long-term strength of our hospitals and helps ensure we are prepared for the challenges and opportunities ahead.

However, the day-to-day needs of our health care services are supported through annual giving. We deeply value and appreciate any continued annual support you may choose to provide.

What tax deduction will I receive for my gift?

Your tax benefits will depend on several factors, including the type of gift, its timing, and whether it is an outright or deferred gift. In general, here are some guidelines:

- Outright gifts to the Fraser Valley Health Care Foundation generate a charitable tax credit. Typically, annual donations over \$200 receive a credit of approximately 46 cents for every dollar donated (subject to Canada Revenue Agency rules and change).
- Gifts of appreciated securities or mutual funds are receipted at fair market value and are generally not subject to capital gains tax, which can provide significant tax advantages.
- Charitable bequests made through your Will are treated as if they were made in the year of death and may be claimed on your final tax return.

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.

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 or email this form** to the attention of our investment counsel at 604.681.9692 or email Nevada.mohammed@td.com
- **Copy by fax or email** to the Fraser Valley Health Care Foundation at 604.851.4898 or 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.

Designation (please check):

- 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

fvhcf.ca · info@fvhcf.ca

Donor's Account Institution Information

Company Name _____

Contact Name _____

Street Address _____

City _____

Prov _____ Postal Code _____

Phone _____ Fax _____

Email _____

Account No. of Donor _____

Donor's Information

Donor _____

Street Address _____

City _____

Prov _____ Postal Code _____

Phone _____ Fax _____

Email _____

I hereby authorize and direct the transfer in kind of the following securities from the above noted account to TD Wealth Private Investment Counsel (Dealer: 7897 KRNM; CUID GIST or DTC 5036) for credit to: Account #1H03TBA: Fraser Valley Health Care Foundation

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

Authorization of Donor:

Signature

Date

Please fax or email completed form to:
TD Wealth Private Investment Counsel
Attn: Nevada Mohammed
TD Tower 18th Floor
700 West Georgia St, Vancouver, BC V 7Y1B6
Phone: 604.870.7227 · Fax: 604.870.7171
Email:nevada.mohammed@td.com

Copy to: Fraser Valley Health Care Foundation
Fax: 604.851.4898 · Email: info@fvhcf.ca

Sample Bequest Wording



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 us at 1-877-661-0314 or at info@fvhcf.ca.

As hospital needs evolve, we'll work with you to honour your wishes while ensuring your gift makes the greatest impact.

You can choose to support a specific Hospital

- 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

Phone 1 877 661 0314

Fax 604 851 4898

Email info@fvhcf.ca



Fraser Valley Health Care FOUNDATION

Your Community. Your Hospital. 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 within the Fraser Valley Regional Hospital District.

Our Hospitals

Abbotsford Regional Hospital
Chilliwack General Hospital
Mission Memorial Hospital
Fraser Canyon Hospital

Our Mission

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

Our Vision

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

Mailing Address

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

Charitable Registration Number

87115 6725 RR0001

