

"My wife Sharon and I treasure the richness that children bring to life and feel a personal responsibility to give. We chose to start a separate life insurance policy, naming Children's Health Foundation as the beneficiary. It allowed us to plan and contribute a much larger gift to Children's specialized health care."

Vito Finucci, Legacy Partner In Hope and
Vice President and Director, RBC Dominion Securities

STEPS FOR LEGACY PLANNING

1. KNOW YOUR ASSETS

To start planning your legacy, you need to prepare a list of your assets:

- Investments (RRSPs or RRIFs, stocks and bonds, bank accounts and life insurance policies)
- Properties (primary home, vacation property)
- Other assets (business interests, antiques and jewelry)

2. CONSIDER YOUR NEEDS

When making your estate plan consider your needs and those of your family. Do you have financial security for your lifetime? Who will be your Executor? Who would you choose to be guardian to any young children? Do you have trusted professional advisors to help you?

3. CONSIDER YOUR DREAMS

How would you like to be remembered? If you could change the world what would you do? What organizations or causes have special meaning to you? Be sure to tell your family about your charitable giving. This will help them to understand what is important to you, and help them share the joy of philanthropy. No estate is too small or too simple to make a difference.

4. MEET WITH YOUR ADVISOR

Tell your advisor your thoughts so far. He or she can help to ensure the type and timing of your gift maximizes the advantages to you and respects your priorities and values. Your lawyer can help you draw up your Will or make any changes that reflect your current situation.

When you contribute to Children's Health Foundation, you're helping children be children, whether they're undergoing treatment for cancer, living with a disability, or visiting the hospital for day surgery. By supporting any one of the many programs available at Children's, you're giving a warm hug and an encouraging smile to children facing adult-sized challenges.



Toll Free: 1.888.834.2496 Phone: 519.432.8564
childhealth.ca



Charitable Registration No. 11885 2482 RR0001

10/14



Your Legacy Their Future

Get to know  **Children's** childhealth.ca
HEALTH FOUNDATION

Rachael wants to be a cardiologist when she grows up – and a scientist, and a famous singer, and a teacher!

At the age of eight, Rachael has plenty of time to dream and plan for her future. Like many other kids with chronic illnesses from across Southwestern Ontario, Rachael's world is full of possibilities thanks to Children's.

Rachael was born with Pulmonary Heart Dysfunction and has been closely monitored and cared for by the cardiology team at Children's Hospital, London Health Sciences Centre ever since. At 20 months old, Rachael underwent open heart surgery at a Toronto hospital, and then returned home to her primary care team at Children's.

As a toddler recovering from major surgery, Rachael learned to walk and talk all over again with the help of therapists at Thames Valley Children's Centre.

Now, six years after her surgery, Rachael is doing well and returns to Children's for annual check-ups.

For Rachael and her family, Children's is a place filled with the familiar faces of the care team she relies upon. A team which will continue to provide expert care and support — thanks to the support of our Legacy Partners in Hope donors.



"It touches our hearts to know that there are people who care so much about children like our Rachael, that they choose to make such a significant and lasting contribution to Children's."

Lisa and Chris Wright, Rachael's parents

A PART OF OUR FAMILY

Everyone who makes a legacy gift, a bequest in a Will or life insurance gift, to Children's is welcomed as a Legacy Partner in Hope.

In honour of your generosity and commitment to children's health care, you will be invited to join us at special events and receive updates from Children's on areas of care that are most important to you. You can also choose how you would like your gift recognized. All legacy information is held in strictest confidence and only those who provide consent are listed publicly.

If you have already made a legacy gift or are currently planning one, please let us know.



"In the 1950s, when I was a 5 year old in hospital with rheumatic fever, I was frightened and had nothing to do but look out the window. Because of those memories, I wanted to ensure that there would always be an art therapy program at Children's Hospital. As a teacher, I've seen art help children create and go to wonderful places in their minds. It is my hope that this legacy I have created will allay their fears and allow them to have fun even though they are in a hospital setting."

Rhonda King, Legacy Partner in Hope

YOUR LEGACY CAN BE A CHILD'S FUTURE.

Planning your legacy is a chance to tell your life story. It's a way to celebrate the people, events and causes that have inspired, motivated and touched you throughout your lifetime. It is also an opportunity to help children and their families from across our region as they build their own life stories.

LASTING AND MEANINGFUL

Anyone can make a legacy gift, and arranging your gift can be a simple process. It's just a matter of taking the first step. See back page on the steps to follow.

By planning your legacy, you decide how your assets are directed in a way that is most meaningful to you – and most financially beneficial for you and your family. In fact, choosing to include a legacy gift in your estate plan can positively affect your current tax situation or that of your heirs.

You can choose to direct your gift to an area of health care, research or rehabilitation that has special significance for you, or you can simply choose to support the highest priority needs of the Children's Family. The decisions you make today will help save and improve our kids' lives for years to come.

WAYS TO GIVE

NAME CHILDREN'S IN YOUR WILL

Making a bequest in your Will is the most popular way to make a Legacy Gift. It is simple to do. We can help, by providing you and your advisor with the information and sample wording you need. A charitable bequest can be a tax efficient way to provide for your family and still leave a legacy gift.

MAKE CHILDREN'S A BENEFICIARY OF YOUR INSURANCE POLICY

You may choose to make Children's the beneficiary of either a new or existing life insurance policy. Modest monthly premiums can create a gift that transforms lives. Depending on how your gift is structured, you could receive a tax receipt on the annual premiums or a tax credit to your estate.

DONATE STOCKS AND SECURITIES

Making a donation of publicly listed securities or mutual funds to Children's is an easy giving option that also provides the opportunity for tax savings. You'll see the results of your gift today, receive a tax receipt for the value of your gift, and be exempt from capital gains tax. Speak with your advisor to see if this is an option that will work for you. We can help provide the forms and information you need.

MAKE A DONATION FROM YOUR RRSP OR RRIF

Another option you may consider, is naming Children's as a beneficiary of your Registered Retirement Savings Plan or Registered Retirement Investment Fund. These are the most highly taxed assets in your estate. You don't need a lawyer to make Children's a beneficiary, simply contact your plan provider. Your estate will receive a charitable donation tax credit for your gift and the funds are not subject to probate. Be sure to consult with your professional advisor to consider how this option may fit with your overall financial plans.

WE CAN HELP

Our team will work closely with you and your advisors, on a confidential basis, to help understand the best options for you and your family; ensuring that your legacy of care reflects your priorities and will have a lasting impact.

Visit childhealth.ca or call 519.432.8564 to learn more about charitable giving options.

