

# A legacy for care close to home



## The WDMH Foundation: Legacy Giving for the Future of Care Close to Home

Excellent, local health care is a team effort. In our community it involves donors, the WDMH Foundation, Winchester District Memorial Hospital, and Dundas Manor Long-Term Care Home. It's been a successful one for years. Let's keep caring!

We fundraise – for both current and future needs – to ensure excellent care at both Winchester District Memorial Hospital and Dundas Manor. Together, these two organizations care for people from Dundas, Stormont, Glengarry, Grenville, Prescott-Russell, parts of the city of Ottawa, and beyond.

### The WDMH Foundation's commitment is simple:

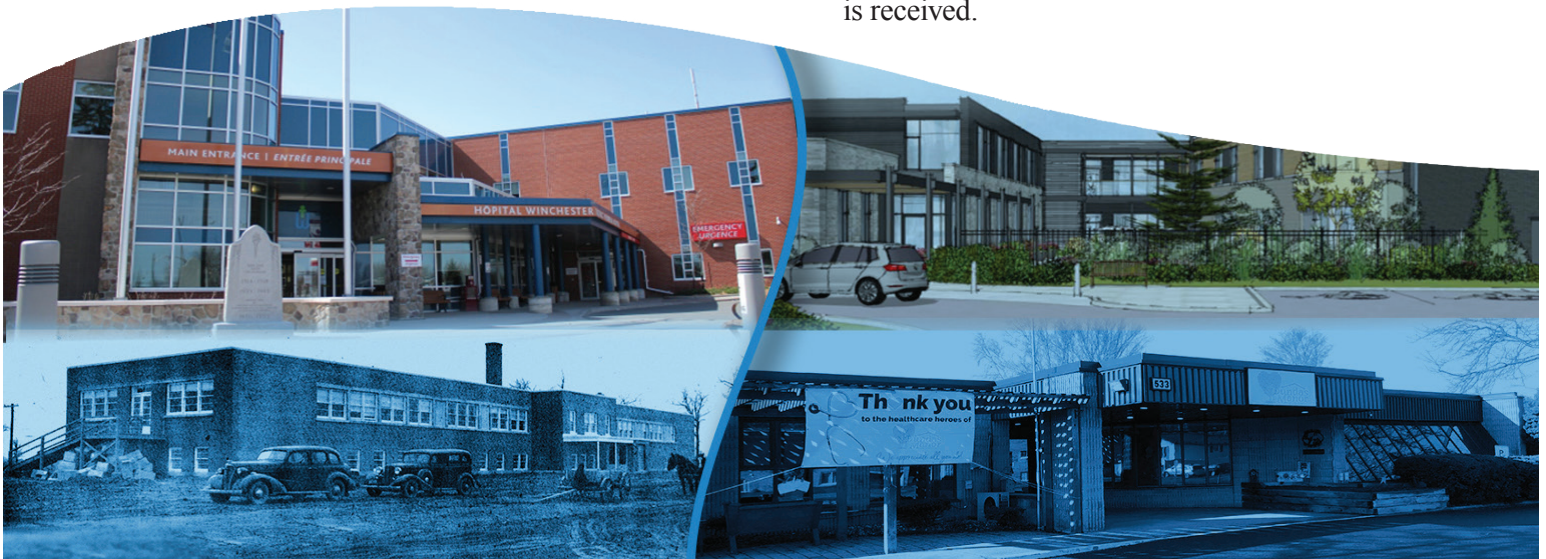
- Together with current and future donors who – like us – value excellence in local health care, we work to inspire and support their investments of time and financial gifts.
- We work hard to ensure that our donors trust us, feel our gratitude, are well-informed, and enjoy positive giving experiences. In all things, our donors are #1.
- We value accountability, transparency, integrity – and celebrating our donors' achievements and successes along the way.

### Gifts by Will

A Will enables you to provide for your family, remember loved ones, and support organizations or causes that were important to you during your lifetime such as the WDMH Foundation.

### Benefits for you:

1. **Tax Advantages** – Your estate will receive an official charitable income tax receipt for the entire amount of your gift.
2. **Control** – You may change your Will at any time.
3. **Simple** – Easy to arrange. Simply ask your lawyer to add a codicil to your current Will or include the WDMH Foundation when creating a new Will.
4. **Flexible** – The designation is revocable by you at any time.
5. **Money Stays in Your Pocket** – Gifts in Wills are realized when you pass, therefore there is no loss to your current way of life or current cash flow.
6. **Peace of Mind** – You can arrange your gift and know it will occur just as planned.
7. **Memorialize** – Your gift will create a lasting legacy for you, your family, or anyone you may wish to honour.
8. **Opportunity** – An opportunity to make a significant gift that you might not be able to give in life.
9. **Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is received.



## How Does It Work?

A legacy gift to the WDMH Foundation provides your estate with a charitable income tax receipt for the full amount of your gift. A gift in your Will is deemed to have been made in the year of your passing. Currently, your executor/executrix (trustee) can apply your estate's charitable contributions to offset up to 100% of your income in the year of your passing, and any unused tax credits can be carried back one year to help offset taxes paid in the previous year. As of 2016, your trustee will be able to allocate available tax credits against the taxation year of your estate in the year of your passing, any earlier taxation year of your estate, or the last two taxation years before your passing. These tax benefits can reduce the amount of taxes your estate will ultimately have to pay.

### Types of bequests include:

- **Specific Gift** – You can leave a specific asset such as a named amount of cash, or an investment such as your Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF), or Tax Free Savings Account (TFSA) to the WDMH Foundation, or an identified parcel of real estate.

- **Residual Gift** – The WDMH Foundation would receive all or a percentage of what remains in your estate after your loved ones have been cared for and other special provisions have been fulfilled.
- **Contingent Gift** – The WDMH Foundation would receive all or shares of your estate after other named beneficiaries have passed.

The following Will sample wordings may help you.

### A gift to support the WDMH Foundation when received:

“I leave to the WDMH Foundation, at 566 Louise Street, Winchester, Ontario, K0C 2K0, [state share or percentage of estate, a specific amount of money, the specific securities you wish to leave, or a specific item or items]. I direct this gift be used as the WDMH Foundation determines to be the highest current need.”

### Your Gift. Your Impact. Your Choice:

Donors always have the choice to choose where their gift will be directed. Our Health Care Undesignated Fund supports both Dundas Manor and Winchester District Memorial Hospital, and there are several other funds strictly for either Dundas Manor or Winchester District Memorial Hospital.

## The Society of Care: Welcome to the Family

All donors who make a legacy gift to the WDMH Foundation are welcomed into our *Society of Care*. This society is our way of honouring and expressing our gratitude for your generosity and commitment to local health care. Your wishes will always be respected, and you decide if your acknowledgement and recognition will be private or public.

*Society of Care* members are offered recognition on either the Winchester District Memorial Hospital or Dundas Manor's Legacy Giving Wall. You can also receive recognition in our annual report.

Best of all you have a life-long association and contact with the WDMH Foundation (in agreed-upon ways). Better still, you become part of the society!

*Society of Care* membership is not mandatory, and all details of your gift are strictly confidential, unless you give permission for your gift and story to be shared.

## Community. Care. Close to Home.

For more information about legacy gifts, please contact us.

**Erin Kapcala, Manager of Major and Planned Giving**

Telephone: 613-774-2422 Ext. 6769 | Email: [ekapcala@wdmh.on.ca](mailto:ekapcala@wdmh.on.ca)

Or just drop in at our office in the hospital lobby!

WDMH Foundation | 566 Louise Street, Winchester, Ontario K0C 2K0

Charitable Registration Number: 89282 4368 RR0001

This information, obtained from various sources, is believed to be reliable, but its accuracy cannot be guaranteed. This information is not intended as legal, financial or tax planning advice. When considering any planned gift, you should always consult your professional advisors to determine the applicability for your specific circumstances.



Fundraising for Excellence.  
Dundas Manor Long-Term Care Home  
Winchester District Memorial Hospital

