



Bequests, Insurance & Gifts of Securities

Planned giving provides a unique opportunity for you to support Carpenter Hospice by designating a future gift. With your planned or deferred gift, you can be assured that Carpenter Hospice will continue to provide compassionate palliative care for future generations.

A planned gift need not be a financial obligation to you now; however it can offer you substantial tax benefits as part of your long-term financial plan. Such gifts allow you to make a meaningful contribution regardless of your age or financial situation.

Bequest

A charitable bequest is a simple way to leave a legacy gift with Carpenter Hospice. The bequest will distribute your specific gift from your estate directly to the hospice.

Your charitable gift can be in the form of a fixed amount or a percentage of assets from a settled estate.

Life Insurance

With life insurance, you can give the gift of a charitable legacy - ensuring your support continues even after your death. Not only does the charity benefit, but you also receive sizable tax savings either during your life-time or thereafter, depending on how you structure your Life Insurance plan.

Securities

Instead of donating cash, you can transfer shares of publicly traded securities directly to Carpenter Hospice. You may not pay tax on your gain.

You will receive a charitable tax receipt for the market value of the securities on the day of settlement.

RRSPs & RRIFs

One of the most tax effective ways to leave a legacy gift is by naming Carpenter Hospice as a partial or full beneficiary of your RRSP or RRIF.

A charitable receipt can be applied up to 100% of net income in the year of death and the preceding tax year.

By arranging a planned gift, you will demonstrate your commitment to individuals in our community who are facing a life-limiting illness. We invite you to create a lasting legacy of care by arranging a planned gift for Carpenter Hospice.



John Gilbert

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Start Planning Your Gift Today

Talk

Carpenter Hospice staff members are pleased to talk to you about how your legacy gift can help with Carpenter Hospice's mission and long-term sustainability.

Consult

Discuss your gift intentions with your professional advisors. This will ensure you are getting the right advice for your specific needs and goals.

Your advisors can provide you with details surrounding the type and timing of your gift to maximize the benefits to you and the hospice.

Share

Consider sharing your charitable and philanthropic goals with your family so that they are aware of your plans and intentions.



What you leave behind is not
what is engraved in stone
monuments, but what is
woven into the lives of others



Legal Name for Carpenter Hospice: Burlington Rotary Community Hospice Inc.
Charitable Status Number: 86312 1125 RR0001

A **General Bequest** directs that the Carpenter Hospice receives a specific sum of cash.

To direct this type of bequest you can choose:

- a. I give to Carpenter Hospice (the Burlington Rotary Community Hospice Inc.) the sum of *** to be used for the general purposes of the charity.
- or
- b. I give to Carpenter Hospice (the Burlington Rotary Community Hospice Inc.) the sum of **** to be used for such purposes as the Directors of the charity may determine.

A **Specific Bequest** directs that the Carpenter Hospice receives a specific piece of your property, such as shares in a mutual fund:

- a. I give to Carpenter Hospice (the Burlington Rotary Community Hospice Inc.) all of my shares in (name of fund) to be used for the general purposes of the charity.

A **Contingent Bequest** directs that a Bequest will be given only if the primary beneficiary does not survive the donor:

- a. If (name of beneficiary) does not survive me or shall die during the administration of my estate or within ninety (90) days from the date of my death, I give to the Carpenter Hospice (Burlington Rotary Community Hospice Inc.) all of the residue and remainder of my estate to be used for the general purposes of the said charity.

A **Bequest for Restricted Purpose** is a gift that is intended to go toward a particular specified purpose. For example an endowment or the wellness program or other program within the hospice. Due to the ongoing changes in healthcare we ask that you make an amendment to your clause that your gift may be used at Director's determination if circumstances change and it is not possible to honour your initial designation.

- a. I give to Carpenter Hospice (the Burlington Rotary Community Hospice Inc.) the sum of *** to be directed to (name of program/designation of funds). In the event that the Directors of the hospice determine it to be impossible, inadvisable or impractical to apply this gift towards said purpose, the gift may be used for other purposes in accordance with the intention of this gift.