

Legacy Giving

Legacy 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	Life Insurance	Securities	RRSPs & RRIFs
<p>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.</p> <p>Your charitable gift can be in the form of a fixed amount or a percentage of assets from a settled estate.</p>	<p>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.</p>	<p>Instead of donating cash, you can transfer shares of publicly traded securities directly to Carpenter Hospice. You may not pay tax on your gain.</p> <p>You will receive a charitable tax receipt for the market value of the securities on the day of settlement.</p>	<p>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.</p> <p>A charitable receipt can be applied up to 100% of net income in the year of death and the preceding tax year.</p>

By arranging a planned gift, you will directly impact many in our community who are facing a life-limiting illness, the loved ones of that person and those who are experiencing grief/loss. We invite you to create a lasting legacy of care by arranging a planned gift for Carpenter Hospice.

Contact

John Gilbert

Manager, Fund Development
Carpenter Hospice
2250 Parkway Drive
Burlington, ON L7P 1T1
Phone: 905.631.9994 ext. 118
Email: jjgilbert@thecarpenterhospice.com
www.thecarpenterhospice.com

**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.