

Legacy Gifts

We are truly honoured that you're considering a gift in your will for the Oakville Hospital Foundation. By including us in your legacy, you're helping secure the future of healthcare for generations to come. This meaningful gesture will ensure compassionate care remains close to home. Thank you for considering such a lasting impact.

To ensure your gift reflects your wishes, consult with your family, financial advisor, and lawyer.



GIFTS IN WILLS

When naming us in your will or as a beneficiary of another gift, please use our legal name and charitable registration #

Legal Name

Oakville Hospital Foundation

Charitable Registration

13145 3490 RR0001

WORDING FOR YOUR WILL

The following options gives you choices to discuss with your family and determine the best course of action with your advisors.

GENERAL WILL WORDING

*I give to the Oakville Hospital Foundation # 13145 3490 RR0001, a **percentage/share** of the residue in my estate... or \$ **specific amount** to be used for **general purposes** or **specific program*** of the Oakville Trafalgar Memorial Hospital.*

**please ask for the proper name of a specific program*

POWER TO VARY CLAUSE WHEN NAMING A SPECIFIC PROGRAM

If in the opinion of the Board of Directors of the Oakville Hospital Foundation, # 13145 3490 RR0001, it should become impossible, inadvisable or impracticable to apply the gift for the said purposes, the board shall use the gift for other purposes in line with the spirit and intention of this gift.

STOCK IN ESTATE

I specifically authorize my Trustees, in their absolute discretion to satisfy such distribution from my estate by way of an in specie transfer or transfers of one or more securities forming part of the residue of my estate at the date of death.

ADDITIONAL OPTIONS

Retirement funds

(Mutual, RRSP's, RRIF's TFSA) can name the hospital as a beneficiary. Simply ask for a multiple change of beneficiary form from your plan provider. These gifts are distributed outside your will, keeping your will private. Be sure to speak with your advisor to determine the best beneficiary for these funds, as some will be among your most taxed assets in your estate.

Life insurance policies

can name the hospital as a **beneficiary**. Ask for a multiple change of beneficiary form from your plan provider. Your estate will receive the charitable tax receipt.

The hospital can also be made the **owner** of a policy. You will receive a receipt today for the cash value of the policy and any future premiums to be paid.

Donor Advised Funds (DAF) or a **Family Foundation**

can make the hospital a beneficiary today and as an estate gift. Directions need to be arranged with the institutional holder of your DAF/Family Foundation.



RECOGNITION

If you've included us in your will, we would be honoured to say thank you. While we understand the personal nature of this decision, knowing about your gift allows us to offer recognition options that may be meaningful to you—whether public, private, or in honour of a loved one.

CONTACT

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**Oakville
Hospital
Foundation**