

## Planned & Estate Giving Information Package

Planned gifts are a great way to leave a legacy for the future of the hospital and future generations in Burlington.

When advising clients on strategic philanthropic giving in the form of bequests, real estate, stocks or securities, life insurance policies and retirement funds, Foundation staff are pleased to support you and your clients in any way we can. All discussions are completely confidential and your clients are under no obligation whatsoever.

### Legal Name and Charitable Registration Number

Our legal name for the purposes of making a gift or bequest is *Joseph Brant Hospital Foundation* and our charitable registration number is **10271 4151 RR0001**

#### Attached Forms and Documents

- J Sample Wording for a Will
- J Donation of Publicly Listed Stocks Form
- J Guide to Tax Benefits
- J Thank You Letter
- J Membership and Statement of Intent

The attached forms are provided to assist clients to add a gift in their Will. If you are not a solicitor, you may also wish to refer your client to a legal member of the Gift Planning Advisory Council to discuss their estate plans. Sample wording has also been provided to leave a bequest in a Will.

### Naming Opportunities

Investment through a charitable donation shows support for the health of our patients and also provides visible public recognition either individually or for businesses and corporations. Foundation staff are pleased to work with you or your client to identify an opportunity that is meaningful to them and reflective of the investment.

### Joseph Brant Society

If your client decides to leave a legacy gift to Joseph Brant Hospital Foundation, we have provided a thank you letter and encourage them to share this information with us through the enclosed Membership and Statement of Intent. As a token of our appreciation, we would be pleased to welcome them into the Joseph Brant Society. This exclusive society recognizes donors that have made a planned or estate gift to the Joseph Brant Hospital Foundation.

The following information is provided to assist you in facilitating a planned or estate gift to Joseph Brant Hospital Foundation. For assistance or more information, please contact

Ashley Davidson  
Director, Major Gifts  
Joseph Brant Hospital Foundation  
905-632-3737 ext. 3474  
ashley.davidson@josephbranthospital.ca

## Sample Wording for a Will

The following are examples of language to consider for leaving a bequest to the Foundation

### Specific Bequest

“TO PAY the following legacy as soon as conveniently possible after my death:

- the sum of \$\_\_\_\_\_ in cash or in kind to JOSEPH BRANT HOSPITAL FOUNDATION to be used to support the highest priorities as determined by the Board of Directors of the Foundation.”

### Residual Bequest

“TO DIVIDE the residue of my estate into as many equal shares as may be necessary to give effect to the following provisions and to distribute such shares to the following organization:

- One (1) share to JOSEPH BRANT HOSPITAL FOUNDATION to be used to support the highest priorities as determined by the Board of Directors of the Foundation.”

### Power to Vary Provision

In order to ensure that your contribution is utilized according to your wishes with the maximum amount of flexibility, you may also wish to include this “Power to Vary” provision:

“If, in the opinion of the Board of Directors of JOSEPH BRANT HOSPITAL FOUNDATION, it should become impossible, inadvisable, or impractical to use this gift for the purposes of supporting \_\_\_\_\_, then the Board may in its discretion use the gift to the best advantage of JOSEPH BRANT HOSPITAL FOUNDATION, keeping in mind the original wishes of the donor.”

### Legal Name and Charitable Registration Number

Our legal name for the purposes of making a gift or bequest is *Joseph Brant Hospital Foundation* and our charitable registration number is **10271 4151 RR0001**.

### For questions and/or inquiries regarding bequests or gifts by Will

Ashley Davidson  
Director, Major Gifts  
Joseph Brant Hospital Foundation  
T: 905-632-3737 ext. 3474  
E: ashley.davidson@josephbranthospital.ca

## Donation of Publicly Listed Securities

Please fill out this form completely with your broker to transfer electronically.

Name of donor/shareholder: \_\_\_\_\_

Address & Phone: \_\_\_\_\_

Delivering institution: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Account number: \_\_\_\_\_

Quantity of shares / units: \_\_\_\_\_ OR dollars: \$ \_\_\_\_\_

Security code: \_\_\_\_\_

Description: \_\_\_\_\_

I hereby authorize the transfer of the above listed shares / units to Joseph Brant Hospital Foundation.

\_\_\_\_\_  
Signature of shareholder

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of joint shareholder (if applicable)

\_\_\_\_\_  
Date

Receiving Institution:	CIBC Wood Gundy, 390 Brant Street, Burlington
Account Name:	Joseph Brant Hospital Foundation
Charitable Registration Number:	10271-4151-RR0001
Account Number:	457-02053-12
Dealer Number:	9280
FINS Number:	T079
Receiving Institution's CUID or DTC:	CUID WGDB, DTC 5030
Contact Name:	George Wright / Janice Black
Representative Code:	ETY
Phone:	905-631-2562
Fax:	905-634-9666

### JBH Foundation Contact:

Ashley Davidson  
Director, Major Gifts  
T: 905-632-3737 ext. 3474  
F: 905-639-6071  
Email: [ashley.davidson@josephbranthospital.ca](mailto:ashley.davidson@josephbranthospital.ca)  
1245 Lakeshore Road Burlington ON L7S 0A2

**PLEASE PROVIDE A COMPLETED COPY OF THIS FORM TO YOUR BROKER/ADVISOR TO INITIATE THE DONATION TRANSFER AND A COPY TO THE JBH FOUNDATION BY FAX OR EMAIL**

## Tax Benefits

Canada Revenue Agency provides tax credits for gifts to eligible charitable organizations such as the Joseph Brant Hospital Foundation. You can claim up to 75% of your net income in charitable donations each year and can in some cases carry forward unused tax credits for up to five years.

### Gifts of Cash (multi-year pledges, monthly gifts and one-time gifts)

The chart below represents the approximate combined federal and provincial non-refundable tax credits that may be realized through charitable donations of cash.

Total donated per year	21.05%* tax credit on first \$200 donated	40.16%* credit on remaining donation	Total Tax Credit	Actual cost to donor
\$1,000	\$42.10	\$321.28	\$363.38	\$636.62
\$5,000	\$42.10	\$1,927.69	\$1969.78	\$3,030.22
\$10,000	\$42.10	\$3,935.68	\$3,977.78	\$6,022.22
\$25,000	\$42.10	\$9,959.68	\$10,001.78	\$14,998.22

\* 21.05% credit on first \$200 donated constitutes 15% federal and 6.05% provincial tax credits

\*\* 40.16% credit on remaining donation constitutes 29% federal and 11.16% provincial tax credits

*As of February 2014, a Stretch Tax Credit may also be available increasing the eligible federal tax credits by an additional 10% (25% and 39% respectively) on your first \$10,000 in donations.*

Note: if you have not made a charitable donation before (or since 2007). You may also be eligible for the *First Time Donor's Super Credit* (25%) on your first \$1,000 in eligible donations.

### Gifts of Stocks and Securities

In 2006, the federal government removed the capital gains tax on stocks and securities donated to registered charities. This means you can significantly decrease the after-tax cost of giving and receive an official tax receipt for the full market value of the stock on the day it is received and sold.

The following example illustrates the benefit of giving stocks to make a charitable contribution versus selling the stock personally and donating the realized cash to charity.

	Cash gift after sales of shares	Gift of shares to charity (capital gains tax exempt)
Value of stock at time of sale or transfer (a)	\$100,000	\$100,000
Initial value of stocks (b)	\$20,000	\$20,000
Capital gain (c) $c = a - b$	\$80,000	\$80,000
Tax on capital gains (d) $d = (c \times 50\%) \times 46\%^*$	\$18,400	\$0
Donation tax credit (e) $e = a \times 46\%^*$	\$46,000	\$46,000
Net tax saving from donation $e - d$	\$27,600	\$46,000

\* Assumes gift made in Ontario with a marginal tax rate of 46%.

**The above is a sample of the tax benefits available. For information about specific tax benefits available to you as an individual or through your corporation, please contact a tax professional or the Canada Revenue Agency by calling 1-800-267-6999 or by visiting [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca).**



Dear Valued Donor,

Thank you for your support of Joseph Brant Hospital by including a gift to our community hospital in your estate plans. We are most grateful for your generosity and thank you for your commitment to Joseph Brant Hospital and to healthcare in our community

We are pleased to extend membership and welcome you to the **Joseph Brant Society**. This exclusive society recognizes and celebrates donors that have made a planned gift in their will to Joseph Brant Hospital Foundation. As a member of this Society, you will receive a number of exclusive benefits such as an invitation to our annual luncheon and other events, special communications and updates, and a commemorative Joseph Brant Society pin.

To confirm your inclusion, we kindly request that you return the enclosed Membership and Statement of Intent form so that we may have the opportunity to thank you and formally welcome you to the Joseph Brant Society. Should you have any questions about the Joseph Brant Society or wish to speak to someone personally, please contact me directly at 905-632-3737 ext. 3474 or by email at [ashley.davidson@josephbranthospital.ca](mailto:ashley.davidson@josephbranthospital.ca).

Our shared vision for Joseph Brant Hospital is quickly becoming a reality thanks to the generous support of donors like you. Your ongoing commitment and belief in Joseph Brant Hospital Foundation continues to help us achieve our mission of inspiring our community to invest in our Hospital to improve the health and well-being of our citizens.

Sincerely,

Ashley Davidson  
Director, Major Gifts  
Joseph Brant Hospital Foundation

## Membership and Statement of Intent

When you make a planned gift, such as naming Joseph Brant Hospital Foundation in your Will, you establish a legacy in your name and become a valued member of the Joseph Brant Society. This exclusive society recognizes donors who have made a planned gift to Joseph Brant Hospital Foundation.

### Benefits of Membership

As a member of the Joseph Brant Society, you receive special benefits that celebrate your important role in ensuring our community has high-quality health care close to home, now and for generations to come:

- J Invitation to our Annual Joseph Brant Society Luncheon
- J Special updates and communications
- J Recognition in our Annual Report and on our Donor Wall
- J Invitation to exclusive events and other opportunities to join with other Society members
- J Joseph Brant Society pin

### Contact Information

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal/Zip Code: \_\_\_\_\_ Date(s) of Birth: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name for Recognition Purpose(s): \_\_\_\_\_

I wish to remain anonymous.

### Statement of Intent

I/We have provided a planned or future gift to support Joseph Brant Hospital Foundation.  
The estimated value of this gift is \$ \_\_\_\_\_ (optional)

I/We understand this estimate does not constitute a legally binding agreement.

My/Our gift is designated for:  Highest Priorities

Other \_\_\_\_\_

I/We have enclosed the relevant portion of my/our estate plans (optional)  
Type of Gift (e.g. specific bequest, residual, life insurance, etc.): \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

### Please return to:

Joseph Brant Hospital Foundation  
1245 Lakeshore Road  
Burlington ON L7S 0A2