

Your Guide to Planned and Legacy Giving

A planned gift is any gift that is planned now for the future.

These types of gifts include:

- A pledge (a promise) to give over time.
- A gift of shares, securities, or mutual funds.
- A legacy gift (a beyond life gift, such as a gift in your Will, or listing the WDMH Foundation as the beneficiary of an investment or life insurance policy).

There are tax-benefits to planned and legacy giving, and you should plan in advance to take advantage of these benefits.

All gifts, no matter the size, are special and leave an incredible impact for excellent, local health care.

Please consider the WDMH Foundation as you plan for your future through charitable giving.

This guide provides an overview of different ways to give and financial benefits of the various ways.

Please reach out to Erin Kapcala, Manager of Major and Planned Giving for the WDMH Foundation to chat more about planned giving: 613-292-7468 / ekapcala@wdmh.on.ca



Community. Care. Close to Home

Your Guide to Planned and Legacy Giving

Table of Contents

1. Shares, Securities, and Mutual Funds

- 1.1. Gifts of Shares, Securities, and Mutual Funds
- 1.2. How to Donate Shares and Securities
 - 1.2.1. Letter of Intent: Form 1 Shares and Securities
- 1.3. How to Donate Mutual Funds
 - 1.3.1. Letter of Intent: Form 2 Mutual Funds

2. Wills

- 2.1. Gifts by Will
- 2.2. Sample Wording for Gifts in Wills

3. Life Insurance

- 3.1. Gifts of Life Insurance

4. RRSPs, RRIFs, and TFSA

- 4.1. Gifts of RRSPs, RRIFs, and Other Investments
- 4.2. Info Sheet for RRSPs and RRIFs

5. Legacy Gift Thank You

- 5.1. Legacy Gift Thank You Form

6. Society of Care

- 6.1. Society of Care Form

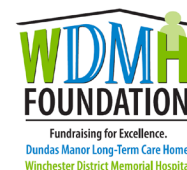
7. WDMH Foundation Funds

- 7.1. Choose How Your Gift Will be Used

If you are looking for something and can't find it, or for more information, please contact Erin Kapcala, the WDMH Foundation's Manager of Major and Planned Giving at 613-292-7468 / ekapcala@wdmh.on.ca

Disclaimer: This guide is not provided as legal or financial planning advice. When considering any planned gift you should always consult your legal advisor, financial planner, and the WDMH Foundation.

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 of Shares, Securities, Mutual Funds, and Other Investments

Gifting Shares, Securities, and Mutual Funds

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to the WDMH Foundation you can avoid taxes and make a significant gift at the same time.

Benefits for you:

1. **Opportunity** – The chance to make a significant gift.
2. **Tax Advantages** – You can eliminate some or all the tax on capital gains and receive an official charitable income tax receipt for the amount at which the shares are valued when they settle into the WDMH Foundation's account.
3. **Simple and Convenient** – Securities are easy to transfer. We will provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to that of the WDMH Foundation.
4. **Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

A charitable income tax receipt is issued for the amount at which the shares are valued when they settle into the WDMH Foundation's account. You must have your broker transfer the securities to the WDMH Foundation. The gift will not qualify for the elimination of capital gains if the securities are sold, and the cash then gifted to the WDMH Foundation.



Gifting Registered Funds

Donating registered assets such as a Registered Retirement Savings Plan (RRSP), a Registered Retirement Income Fund (RRIF) or a Tax Free Savings Account (TFSA) allows you to create a legacy for the WDMH Foundation – once your needs and those of your loved ones have been met. Donating all or part of an RRSP, RRIF or TFSA is an effective way to reduce the taxes payable by your estate. If you leave your RRSP, RRIF or TFSA to the WDMH Foundation, your estate will receive a charitable income tax receipt for the entire amount received.

Benefits for you:

- 1. Tax Advantages** – A tax-effective means of donating. And your estate will receive a charitable income tax receipt for the amount of your gift.
- 2. Control** – You retain the use of the investment.
- 3. Simple** – Simply ask your financial advisor/financial institution to change the beneficiary designation to the WDMH Foundation or include your intent in your Will.
- 4. Flexible** – The designation is revocable by you at any time.
- 5. Cost Effective** – There are no extra out-of-pocket costs.
- 6. Peace of Mind** – You can arrange your gift and know it will occur just as planned.

- 7. Memorialize** – You can create a lasting legacy for you, your family or anyone you may wish to honour.
- 8. Opportunity** – A chance to make a significant gift.
- 9. Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

There are two ways to make your donation:

- 1.** You can name the WDMH Foundation as the direct beneficiary to all or part of your investment. Upon your passing, the proceeds will be paid directly to the WDMH Foundation.
- 2.** You can name your estate as the beneficiary of your RRSP, RRIF or TFSA and leave instructions in your Will to donate all or part to the WDMH Foundation. You may specify a percentage of the investment to be gifted or a specific dollar amount. Your estate will receive a charitable income tax receipt – which can help offset your taxes for the year of your passing and the previous year.

Donors always have the choice to choose where their gift will be directed. Please see our **WDMH Foundation Funds** – or reach out to us.

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

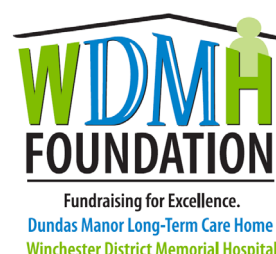
Telephone: 613-774-2422 Ext. 6769 | Email: ekapcala@wdmh.on.ca

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

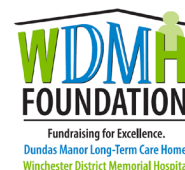
WDMH Foundation | 566 Louise Street, Winchester, Ontario K0C 2K0

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. Rules relating to taxes sometimes change, and it is best to reach out to the WDMH Foundation and to your financial advisor to confirm current charitable tax benefits.



How to Donate Shares and Securities to the WDMH Foundation



Whether the securities are held as paper certificates, or in a brokerage account, it is important to know that the ownership of the shares must be transferred to us. You/your broker cannot sell them first in order to realize one of the tax benefits (avoiding some or all capital gains) of donating shares to the WDMH Foundation.

1. To transfer securities electronically, please complete our “Letter of Intent, FORM 1” with your broker, and give copies to your broker as well as to the WDMH Foundation.

2. Your broker will need to contact our broker, and send to them your completed Form 1. This will initiate the transfer of securities. Our broker is RBC Dominion Securities and their details are:

Account of: WDMH Foundation

Receiving Institution: RBC Dominion Securities Inc.

Contact: Kathy Hunt, CIM, FMA, FCSI,
Portfolio Manager

Phone: 613-345-7074 OR Toll-Free: 1-800-567-0533

Fax: 613-345-7707

Email: kathy.hunt@rbc.com

3. The WDMH Foundation will be advised by RBC Dominion Securities once the securities have been transferred to the brokerage account.

4. The value of your official charitable income tax receipt will be for the value of the shares/securities when they settle into the WDMH Foundation’s brokerage

account, as this is when the transfer of property is deemed to have taken place. Donated securities will be sold immediately by the WDMH Foundation, as per WDMH Foundation policy.

5. Securities that are held within a trust or held in dividend reinvestment plans may require the additional step of certificating the stock in your name before the transfer can be completed to the WDMH Foundation.

6. If you hold share certificates in paper form, please endorse each one of the shares or make them payable to the WDMH Foundation. Please send the shares by courier, or deliver in person, directly to the WDMH Foundation office, located in the lobby of the hospital. The WDMH Foundation will then send the shares on to its broker. Please note, the printed shares must still be submitted with our “Letter of Intent, FORM 1” described in Step 1.

*As per WDMH Foundation Policy, we recommend gifts of liquid securities and not illiquid securities. Please be sure to discuss with your broker to ensure your gift will have the impact you want.

You choose if your gift will support Dundas Manor Long-Term Care Home, Winchester District Memorial Hospital – or both! Please see our WDMH Foundation Funds – or reach out to us.

Community. Care. Close to Home.

For more information, please contact us.

Erin Kapcala, Manager of Major and Planned Giving

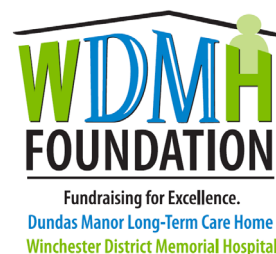
Telephone: 613-774-2422 Ext. 6769 | Email: ekapcala@wdmh.on.ca

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

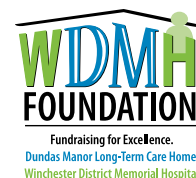
WDMH Foundation | 566 Louise Street, Winchester, Ontario K0C 2K0

Charitable Registration Number: 89282 4368 RR0001

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Letter of Intent, Form 1 – Shares or Securities

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to the WDMH Foundation you can eliminate some or all the tax on capital gains and receive an official charitable income tax receipt. For convenience we suggest you make your donation of securities via electronic transfer from your broker to ours. Please follow the steps listed below to make your gift today. Thank you!

Name: _____

Address: _____

Phone: _____ Email: _____

☐ Yes, I would like to receive quarterly e-updates from the WDMH Foundation. (Please provide your email address in the space above)

We want your gift to have the impact you want! Please select which fund/s you want your gift directed to. If you would like more information about any of these Funds, please reach out to us or see our **WDMH Foundation Funds – Choose How Your Gift Will Be Used**

WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor

- ☐ **Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received.

WDMH Foundation Funds supporting Dundas Manor include:

- ☐ **Dundas Manor General Fund** (including the new Dundas Manor)
☐ **Dundas Manor Activity Fund**

WDMH Foundation Funds supporting Winchester District Memorial Hospital include:

- ☐ **WDMH Family Care Fund** ☐ **WDMH General Equipment Fund**
☐ **WDMH Cancer Care Fund** ☐ **WDMH Diagnostic Imaging Fund**



To:**Donor's Brokerage Firm (and FINS #)****Account Number****Street Address****City****Province/Postal Code****Brokerage Firm Contact Name****Telephone Number & Extension****Brokerage Firm Contact Email Address**

I empower you, my broker, to make free delivery of the following securities from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation (Charitable Registration # 89282 4368 RR0001), to RBC Dominion Securities, Brockville ON (CUID #DOMA), Account # 504-02397-16, Dealer Code 9190-E75 Euroclear 90065 (DTC 5002).

Number of shares**Security name and ISIN**

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707, or send by e-mail PDF to kathy.hunt@rbc.com.

Date**Name****Signature**

I acknowledge receipt of this direction to transfer securities in-kind.

Date**Donor's Brokerage firm****Signature**

In order to initiate your in-kind gift transfer, please complete this form with your broker and send a copy to Erin Kapcala either by email at ekapcala@wdmh.on.ca, by fax at 613-774-7202 or by mail to WDMH Foundation, 566 Louise Street, Winchester, ON K0C 2K0. A WDMH Foundation representative will contact you to discuss your recognition and gift designation preferences.

Typically, in order to allow sufficient time to process your gift by the end of the calendar year, transfer instructions should be provided to your broker and our broker no later than December 15. The value of the official income tax receipt will be for the value of the shares/securities when they settle into the Foundation's brokerage account, as this is when the transfer of property is deemed to have taken place.

PLEASE NOTE: In order to avoid accepting and transferring shares that cannot be liquidated (sold or transferred), please call Erin Kapcala at 613-774-2422 ext. 6769 at our office prior to submitting this form to your broker.

How to Donate Mutual Funds to the WDMH Foundation



Whether the mutual funds are held with a major brokerage firm, or if they are held in connection with a mutual fund broker/dealer, you may have your mutual funds transferred to the WDMH Foundation through our account with RBC Dominion Securities (see “Letter of Intent, FORM 2”). It is important to know that the ownership of these shares must be transferred to us. You/your broker cannot sell them first in order to realize one of the tax benefits (avoiding some or all capital gains) of donating shares to the WDMH Foundation. Also, donations of mutual funds take longer to process than gifts of stocks due to the additional steps needed to transfer ownership. The fund company may require you to sign a fund company disclaimer. Contact your broker/dealer to obtain the required form for your signature.

1. To transfer units of mutual funds electronically, please complete our “Letter of Intent, FORM 2” with your broker, and give copies to your broker as well as to the WDMH Foundation.
 2. Your broker will need to contact our broker, and send to them your completed Form 2. This will initiate the transfer of securities. Our broker is RBC Dominion Securities and their details are:

Account of: WDMH Foundation
Receiving Institution: RBC Dominion Securities Inc.
Contact: Kathy Hunt, CIM, FMA, FCSI,
 Portfolio Manager
Phone: 613-345-7074 OR Toll-Free: 1-800-567-0533
Fax: 613-345-7707
Email: kathy.hunt@rbc.com
 3. The WDMH Foundation will be advised by RBC Dominion Securities once the units have been transferred to the brokerage account.
 4. The value of your official charitable income tax receipt will be for the value of the mutual fund units when they settle into the WDMH Foundation’s brokerage account, as this is when the transfer of property is deemed to have taken place. Donated mutual funds will be sold immediately by the WDMH Foundation as per WDMH Foundation policy.
- *As per WDMH Foundation Policy, we recommend gifts of liquid securities and not illiquid securities. Please note, that donations of mutual funds take longer to process than gifts of stocks due to the additional steps needed to transfer ownership. Please be sure to discuss with your broker to ensure your gift will have the impact you want.

You choose if your gift will support Dundas Manor Long-Term Care Home, Winchester District Memorial Hospital – or both! Please see our WDMH Foundation Funds – or reach out to us.

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For more information, please contact us.

Erin Kapcala, Manager of Major and Planned Giving

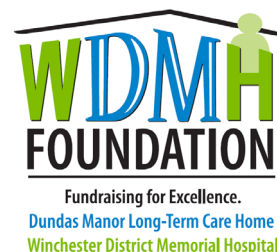
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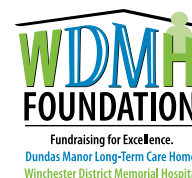
WDMH Foundation | 566 Louise Street, Winchester, Ontario K0C 2K0

Charitable Registration Number: 89282 4368 RR0001

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Letter of Intent, Form 2 – Mutual Funds

If you hold mutual funds in an account with a major brokerage firm, or if they are held in connection with a mutual fund broker/dealer, you may have your mutual funds transferred to the WDMH Foundation through our account with RBC Dominion Securities. Donations of mutual funds take longer to process than gifts of stocks due to the additional steps needed to transfer ownership. The fund company may require you to sign a fund company disclaimer. Contact your broker/dealer to obtain the required form for your signature.

Name: _____

Address: _____

Phone: _____ Email: _____

- ☐ Yes, I would like to receive quarterly e-updates from the WDMH Foundation. (Please provide your email address in the space above)

We want your gift to have the impact you want! Please select which fund/s you want your gift directed to. If you would like more information about any of these Funds, please reach out to us or see our **WDMH Foundation Funds – Choose How Your Gift Will Be Used**

WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor

- ☐ **Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received.

WDMH Foundation Funds supporting Dundas Manor include:

- ☐ **Dundas Manor General Fund** (including the new Dundas Manor)
☐ **Dundas Manor Activity Fund**

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- ☐ **WDMH Family Care Fund** ☐ **WDMH General Equipment Fund**
☐ **WDMH Cancer Care Fund** ☐ **WDMH Diagnostic Imaging Fund**



To:

Donor's Brokerage Firm (and FINS #)	Account Number	
Street Address	City	Province/Postal Code
Brokerage Firm Contact Name	Telephone Number & Extension	
Brokerage Firm Contact Email Address		

Re:

Donor(s) Name(s)	Account Number	
Street Address of Donor(s)	City	Province/Postal Code

I empower you, my broker, to make free delivery of the following mutual funds from my account electronically, for deposit as a donation-in-kind to the WDMH Foundation (Charitable Registration # 89282 4368 RR0001), to RBC Dominion Securities, Brockville ON (CUID #DOMA), Account # 504-02397-16, Dealer Code 9190-E75 Euroclear 90065 (DTC 5002).

Number of units	Mutual Fund Name (including Full Fund Code)
_____	_____
_____	_____
_____	_____
_____	_____

You, my/our broker, are further directed to execute this transfer immediately upon receipt of this notice. To acknowledge receipt of this instruction, immediately fax a signed copy of this form to RBC Dominion Securities at 613-345-7707, or send by e-mail PDF to kathy.hunt@rbc.com.

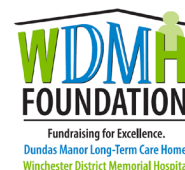
Date	Name	Signature
_____	_____	_____
_____	_____	_____

I acknowledge receipt of this direction to transfer mutual funds in-kind.

Date	Brokerage firm	Signature
_____	_____	_____

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A legacy for care close to home



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

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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.

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- 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.

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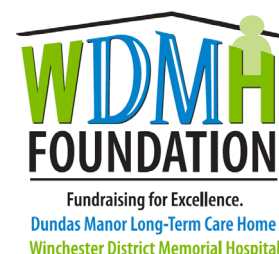
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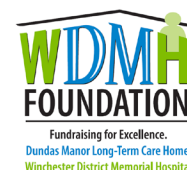
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Sample Wording for Gifts in Wills

A Gift to WDMH Foundation:

“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.”

A Gift to the WDMH Foundation to support Winchester District Memorial Hospital:

“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 at Winchester District Memorial Hospital.”

A Gift to the WDMH Foundation to support Dundas Manor Long-Term Care Home:

“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 at Dundas Manor Long-Term Care Home”.

Community. Care. Close to Home.

For more information about legacy gifts, please contact us.

Erin Kapcala, Manager of Major and Planned Giving

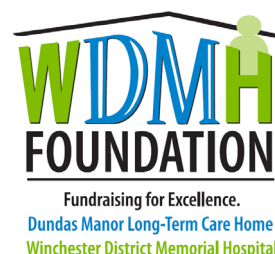
Telephone: 613-774-2422 Ext. 6769 | Email: ekapcala@wdmh.on.ca

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

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Charitable Registration Number: 89282 4368 RR0001

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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 Life Insurance

A gift of Life Insurance is a simple and easy way to support the WDMH Foundation. Many donors of all ages would like to make a significant contribution; however, they may not have the financial resources to do so during their lifetime. A gift of Life Insurance — whether a new or an existing policy provides an opportunity to create such a gift.

Benefits for you:

- 1. Convenient** – The transaction is simple. Your Life Insurance specialist can advise you on the type of policy that would best fit your financial situation and legacy gift vision.
- 2. Inexpensive** – A way to make a larger gift than you might otherwise be able to, without depleting your current assets now or your estate later.
- 3. Leverage** – The ultimate value of your policy will be far more than the premiums you pay.
- 4. Save Taxes** – With some gift policies, you can receive an immediate tax relief through charitable income tax receipts for premiums paid.
- 5. Estate Preservation** – Gifts of Life Insurance, when realized, go directly to WDMH Foundation staying outside of your estate. The gift also provides an official charitable income tax receipt to help offset what your estate may have to pay in tax.
- 6. Eliminates Probate, Legal & Executor Fees** – Life Insurance is not subject to probate costs or delays in settlement. The full proceeds are payable to the WDMH Foundation at maturity or once proceeds are made available.



7. **Peace of Mind** – You can arrange your gift and know it will occur just as planned.
8. **Control** – Your gift is not a matter of public record so you may remain anonymous.
9. **Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

There are a few easy ways to make a gift of Life Insurance.

1. Listing the WDMH Foundation as the beneficiary of an existing policy

You can list the WDMH Foundation as the beneficiary of an existing policy and maintain control over the policy. Once the gift is received, your estate will receive a charitable income tax receipt for the full amount that the Foundation received from your gift.

2. Listing the WDMH Foundation as the owner and beneficiary of an existing policy

You can transfer an existing policy by naming the WDMH Foundation as the owner and beneficiary. If the policy is paid up, no additional premiums need be paid by you or the WDMH Foundation. The charitable income tax receipt is issued in life for the cash surrender value of the policy plus any accumulated dividends and interest at the time of the transfer. If you continue to fund future premiums, these amounts will also be eligible for a charitable income tax receipt in life.

3. Listing the WDMH Foundation as the beneficiary of a new policy

You can list the WDMH Foundation as the beneficiary of a new policy and maintain control over the policy. Once the gift is received, your estate will receive a charitable income tax receipt for the full amount that the Foundation received from your policy.

4. Listing the WDMH Foundation as the owner and beneficiary of a new policy

You can also take out a new policy with the WDMH Foundation as the owner and beneficiary of the policy to receive a charitable income tax receipt in life. It is important that the Foundation is both the owner and the beneficiary. If the Foundation is not made the owner, no gift will have been made in life, and no charitable income tax receipt can be issued in life. Under this type of arrangement, each year you pay the premiums, and the Foundation issues an annual charitable income tax receipt for these premiums. The insurance proceeds will be paid directly to the WDMH Foundation upon your passing.

5. Listing your estate as the beneficiary, and including the WDMH Foundation in your Will

It may be to your advantage to name your estate as the beneficiary of your life insurance policy, and then make a same dollar amount bequest in your Will to the WDMH Foundation. You will not receive a charitable tax receipt for any of the premiums paid during your life. However, your estate will receive a charitable income tax receipt for the full amount of the insurance proceeds.

6. Listing the WDMH Foundation as your beneficiary on your individual or group life insurance

You can name the WDMH Foundation as a beneficiary on your individual or group life insurance. You retain ownership of the policy and can change the beneficiary designation at any time. If you are a salaried employee and have a benefit plan that has a death benefit component to it, consider naming the WDMH Foundation as the beneficiary. You will not receive a charitable tax receipt for any premiums paid during your lifetime, rather your estate would receive a charitable income tax receipt.

There are a number of ways to support the WDMH Foundation with a gift of Life Insurance.

It's best to discuss these options over with your financial advisor and insurance broker and with us to see which is the best route for you, your financial situation, and WDMH Foundation policies.

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.

Please see our **WDMH Foundation Funds**, or reach out to discuss the impact you want your gift to have for Winchester District Memorial Hospital, Dundas Manor – or both!

“In this area ... at least 75% of us are older people ... and you suddenly realize you’re not going take your money with [you], so you may as well put it to use for this community.

You’ll never regret making a legacy gift. Your gift will live on. It’s a lifetime gift.”

—Mr. W, A Legacy Donor who listed the WDMH Foundation as the beneficiary of his Life Insurance Policy

The *Society of Care*: Welcome to the Family

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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.

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Erin Kapcala, Manager of Major and Planned Giving

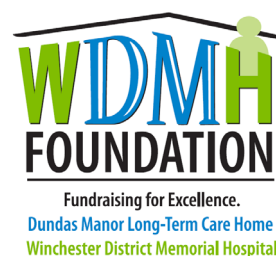
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A legacy for care close to home



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- 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 of Shares, Securities, Mutual Funds, and Other Investments

Gifting Shares, Securities, and Mutual Funds

If you own securities and they have grown in value, you will be taxed on their capital gains when the securities are sold. By donating those securities directly to the WDMH Foundation you can avoid taxes and make a significant gift at the same time.

Benefits for you:

- 1. Opportunity** – The chance to make a significant gift.
- 2. Tax Advantages** – You can eliminate some or all the tax on capital gains and receive an official charitable income tax receipt for the amount at which the shares are valued when they settle into the WDMH Foundation's account.
- 3. Simple and Convenient** – Securities are easy to transfer. We will provide the forms and directions so that your broker can transfer the shares electronically from your brokerage account to that of the WDMH Foundation.
- 4. Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

A charitable income tax receipt is issued for the amount at which the shares are valued when they settle into the WDMH Foundation's account. You must have your broker transfer the securities to the WDMH Foundation. The gift will not qualify for the elimination of capital gains if the securities are sold, and the cash then gifted to the WDMH Foundation.



Gifting Registered Funds

Donating registered assets such as a Registered Retirement Savings Plan (RRSP), a Registered Retirement Income Fund (RRIF) or a Tax Free Savings Account (TFSA) allows you to create a legacy for the WDMH Foundation – once your needs and those of your loved ones have been met. Donating all or part of an RRSP, RRIF or TFSA is an effective way to reduce the taxes payable by your estate. If you leave your RRSP, RRIF or TFSA to the WDMH Foundation, your estate will receive a charitable income tax receipt for the entire amount received.

Benefits for you:

- 1. Tax Advantages** – A tax-effective means of donating. And your estate will receive a charitable income tax receipt for the amount of your gift.
- 2. Control** – You retain the use of the investment.
- 3. Simple** – Simply ask your financial advisor/financial institution to change the beneficiary designation to the WDMH Foundation or include your intent in your Will.
- 4. Flexible** – The designation is revocable by you at any time.
- 5. Cost Effective** – There are no extra out-of-pocket costs.
- 6. Peace of Mind** – You can arrange your gift and know it will occur just as planned.

- 7. Memorialize** – You can create a lasting legacy for you, your family or anyone you may wish to honour.
- 8. Opportunity** – A chance to make a significant gift.
- 9. Recognition** – Your gift can be honoured during your lifetime, should you wish and/or once your gift is realized.

How does it work?

There are two ways to make your donation:

- 1.** You can name the WDMH Foundation as the direct beneficiary to all or part of your investment. Upon your passing, the proceeds will be paid directly to the WDMH Foundation.
- 2.** You can name your estate as the beneficiary of your RRSP, RRIF or TFSA and leave instructions in your Will to donate all or part to the WDMH Foundation. You may specify a percentage of the investment to be gifted or a specific dollar amount. Your estate will receive a charitable income tax receipt – which can help offset your taxes for the year of your passing and the previous year.

Donors always have the choice to choose where their gift will be directed. Please see our **WDMH Foundation Funds** – or reach out to us.

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.

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Erin Kapcala, Manager of Major and Planned Giving

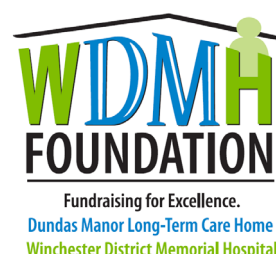
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Charitable Registration Number: 89282 4368 RR0001

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A legacy for care close to home



RRSPs/RRIFs: Your savings put to work for your family and the future of local health care

RRSPs¹ and RRIFs² are tax deferred investments, but the entire amount will eventually become taxable, either during your lifetime or by your estate (although spouses and dependent children are eligible as tax deferred beneficiaries).

This can result in the loss of nearly half of these assets to taxes. But by naming the WDMH Foundation as one of the beneficiaries of your registered funds, you will leave a generous gift that will have future impact on local health care, and your estate will benefit from the official charitable income tax receipt.

Company Sponsored Pension Plans

Many company sponsored pension plans allow continuing members to name a charitable beneficiary. If there is no spouse or dependent child to consider, naming the WDMH Foundation the beneficiary of your pension plan is a wonderful gift that will leave an incredible impact.

Ways to Donate Retirement Funds

Below are three strategies you could consider to leave an impact and save taxes by donating your registered assets to the WDMH Foundation. It's important to note that without planning a charitable gift, a RRIF with a value of \$250,000 at death would create approximately a \$100,000 tax bill, owed to the Canada Revenue Agency (assuming a 40% marginal tax rate). Your estate or heirs would then receive the remaining \$150,000.

1. If it is best for you, withdraw extra funds from a RRIF (or capital from an RRSP) and donate the same amount. You will receive an official charitable income tax receipt offsetting the income tax payable on the withdrawal.

2. Another way to give is by naming the WDMH Foundation as the beneficiary (or alternate beneficiary, after a spouse, or dependant child) on your RRSP or RRIF documents using your financial institution's beneficiary form. Upon your passing (or that of your spouse), the WDMH Foundation receives the balance of the assets directly from the financial institution. Your estate would then receive an official charitable income tax receipt from the WDMH Foundation to offset the other taxable income in your estate.
3. You can rollover your RRIF (or RRSP) tax-free to a spouse, financially dependent child or grandchild under 18, or mentally or physically dependant child or grandchild of any age. But, if none of these circumstances are possible, it may be worth considering having your estate be the beneficiary, and making a significant gift in your Will to the WDMH Foundation. RRSPs/RRIFs are most people's largest tax liability in an estate, since they are a tax deferred investment during life. The charitable income tax receipt your estate would receive would help reduce your taxes. Donations can be claimed against 100 % of net income in the year of death. And if the donation is too large to claim in the year of death, it is possible to carry back donations to claim against 100% of net income in the preceding year. The 100% contribution limit can eliminate all tax in the final two years if the gift is large relative to income.

Collapsing or Closing an RRSP/RRIF

It seldom makes sense to make gifts directly from an RRSP/RRIF during life. This is because withdrawals are treated as regular taxable income and you could be faced with claw-backs to government benefit programs, such as Old Age Security (OAS). However, there are times when collapsing a RRIF is a financially sound tactic and a charitable gift can help offset taxation of the income. Tax and financial advisors should be consulted to determine the appropriateness of collapsing a registered plan.

¹ An RRSP is a Registered Retirement Savings Plan. It is a legal trust registered with the Canada Revenue Agency and used to save for retirement. RRSP contributions are tax deductible and taxes are deferred until the money is withdrawn.

² A RRIF is a Registered Retirement Income Fund. It is a tax-deferred retirement plan under Canadian tax law. Individuals use a RRIF to generate income from the savings accumulated under their Registered Retirement Savings Plan. As with an RRSP, a RRIF account is registered with the Canada Revenue Agency.

Mandatory RRIF Withdrawals

To ensure a stream of taxable income, the government requires a minimum annual withdrawal from your RRIF in the year you turn 71. If this income is not needed for current living expenses, you may feel you are simply throwing away your hard-earned money on taxes. Donating this excess income could make sense for you.

A Word or Two About Professional Advice

Your financial and family situation is unique to you. You owe it to yourself, your loved ones, and the charities whose work you wish to support, to seek professional advice to make the most of your life savings and to achieve your philanthropic goals.

Please consult professional financial, estate and gift planning advisors to determine the best course of action and plan for you, your family and the WDMH Foundation.

Please Let Us Know!

If you decide to name the WDMH Foundation as one of your beneficiaries – thank you! Please let us know so we can provide you with our legal name and registration number for your form, and make sure your gift will have the impact you want.

Your Gift. Your Impact. Your Choice

As with all gifts to the WDMH Foundation, you can choose if your gift will support Winchester District Memorial Hospital, Dundas Manor Long-Term Care Home or both.



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For more information about legacy gifts, please contact us.

Erin Kapcala, Manager of Major and Planned Giving

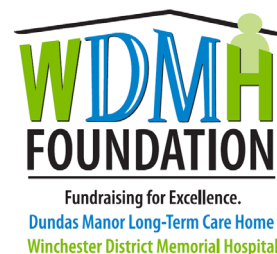
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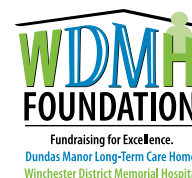
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A legacy for care close to home



Legacy Gift Thank You Form

Your life's legacy is so important. And something worth thinking about and planning for. A legacy gift is a simple, thoughtful way to reflect your vision for compassionate excellence in health care, and to support the future of Winchester District Memorial Hospital and/or Dundas Manor, and all impacted by this care close to home. If you have included a gift to the WDMH Foundation in your Will, or listed the WDMH Foundation as a beneficiary to an investment - thank you! We hope you will complete and sign this Thank You form. By doing so, we will be able to thank you for your generous legacy gift, discuss and confirm your recognition opportunities (should you wish), discuss the impact you will have, and ensure your gift will support Winchester District Memorial Hospital and/or Dundas Manor in the way you intended. The details of your gift will remain private, unless you would like your intention shared.

Please only share what you are comfortable with. All information will remain confidential.

Full Name: _____ **Date of Birth: M/D/Y** _____

Address: _____

Phone: _____ **Email:** _____

My Intent for My Gift

We want your gift to have the impact you want! Please select which fund/s you want your gift directed to. If you would like more information about any of these Funds, please reach out to us! We'll be happy to chat more.

WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor

- ☐ **Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received.

WDMH Foundation Funds supporting Dundas Manor include:

- ☐ **Dundas Manor General Fund** (including the new Dundas Manor)
- ☐ **Dundas Manor Activity Fund**

WDMH Foundation Funds supporting Winchester District Memorial Hospital include:

- ☐ **WDMH Family Care Fund** ☐ **WDMH General Equipment Fund**
- ☐ **WDMH Cancer Care Fund** ☐ **WDMH Diagnostic Imaging Fund**

As needs at WDMH and/or Dundas Manor change, we kindly encourage you to check the box below. This will ensure your gift will be used where your impact will be most needed.

- ☐ If circumstances make it impossible or impractical to carry out my above preferred designation, I empower the WDMH Foundation Board of Directors to use my gift to the Winchester District Memorial Hospital/Dundas Manor's best advantage for other purposes consistent with the spirit and intention of my gift.

Note: If you chose the Health Care Undesignated Fund, the needs of both Winchester District Memorial Hospital and Dundas Manor would be taken into account at such time.

My Recognition Opportunities

- ☐ I am interested in learning about in life and/or beyond life recognition opportunities.
- ☐ I am not interested in learning about in life and/or beyond life recognition opportunities.

Is there anything else you want to share (about your gift, or Winchester District Memorial Hospital or Dundas Manor)?

Donor Signature: _____ **Date:** _____

Thank you!

Your legacy gift makes you a member of our *Society of Care*! Your investment in the future of local health care is a true commitment to the compassionate excellence we work towards every day. We are so grateful for your generous support, and for entrusting us with part of your legacy. Thank you.

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.

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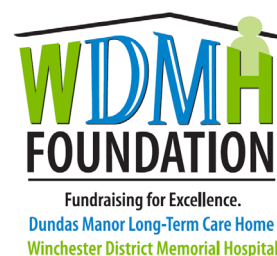
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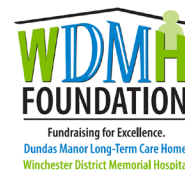
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A legacy for care close to home



Welcome to our Society of Care

Everyone who makes a legacy gift (a beyond life gift, such as a gift in their Will, or naming the WDMH Foundation as a beneficiary to a life insurance policy or investment) to the WDMH Foundation is welcomed into our Society of Care!

The Society of Care was created as an expression of gratitude to anyone who bequeaths a legacy gift to the WDMH Foundation to benefit Winchester District Memorial Hospital and/or Dundas Manor Long-Term Care Home. It's our way of thanking you, recognizing your compassion and honouring your commitment to care through your legacy gift.

As a Society of Care Member, you can receive:

(please check all that you would like to be part of):

- ☐ Life-long association and contact with the WDMH Foundation (in agreed-upon ways)
- ☐ Invitation to the Foundation's Leadership Society Members Events
- ☐ Invitation to other events and seminars, as available
- ☐ A subscription to our newsletters (by mail or email) to:

Please know, membership is never mandatory, and all details of your gift are kept strictly confidential. We respect your privacy.

- ☐ Recognition in our Annual Report to the Community*
- ☐ Listing on our Society of Care Wall at Winchester District Memorial Hospital or Dundas Manor (if desired; can be listed under "Anonymous")*

(please write out mail or email address that you wish for your newsletters be sent to)

*If you would like listed recognition, please share how you would like your gift intention shown:

- ☐ I would like my name (or my family's name) listed as:

(please write name as you wish listed in our Report to the Community and/or on our Society of Care Wall as you checked off above – or you can also write "Anonymous" if you want your intention noted, but wish to remain anonymous)

Name: _____ Date: _____

Signature: _____ Telephone Number: _____

Your investment in the future of local health care is a true commitment to the compassionate excellence we work towards every day. We are so grateful for your generous support, and for entrusting us with part of your legacy. Thank you.

We understand if you do not want to publicly share your intention, but we do hope you will let us know that you have made a legacy gift so we may thank you privately and discuss with you the impact you want your gift to have.

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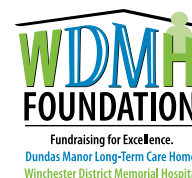
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WDMH Foundation Fund supporting both Winchester District Memorial Hospital and Dundas Manor

- **Health Care Undesignated Fund:** to support the highest priority needs at either Winchester District Memorial Hospital or Dundas Manor, as determined by the WDMH Foundation Board of Directors at the time the gift is received

WDMH Foundation Funds supporting Dundas Manor include:

- **Dundas Manor General Fund:** to be used where it is needed most – including for the new Dundas Manor
- **Dundas Manor Activity Fund:** make things a little extra special for our residents, programs, and home

WDMH Foundation Funds supporting Winchester District Memorial Hospital include:

- **WDMH Family Care Fund:** supporting care for all families just like yours – will be used where needed most at Winchester District Memorial Hospital
- **WDMH General Equipment Fund:** solely in support of the purchase of medical equipment
- **WDMH Cancer Care Fund:** to support patient care and medical equipment purchases related to cancer care
- **WDMH Diagnostic Imaging Fund:** every 10 years or so, our Diagnostic Imaging equipment (Ultrasound, Xray, CT and Mammography) needs to be replaced. Each piece is essential to care close to home as a lot of our patients need some sort of diagnostic scan.

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For more information about legacy gifts, please contact us.

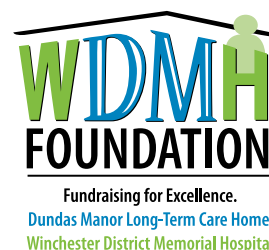
Erin Kapcala, Manager of Major and Planned Giving

Telephone: 613-774-2422 Ext. 6769 | Email: ekapcala@wdmh.on.ca

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.

A Legacy of Care Starts With Our Community

Thank you for reading our *Your Guide to Planned and Legacy Giving*. We hope it helped you understand the different ways that you can make an impact on excellent, local health care now and in the future.

We know that many are touched by the care provided to them, or a loved one, and are often inspired to give. Their hope is that their gift will show their gratitude and help ensure that this care will continue for their family, friends, and community - now and in the future. Many of these donors want to say, 'thank you' and wish they could do more. A planned gift is a way to make a difference.

Many people believe that the size of the gift they could make would not be significant enough. All gifts, no matter the size, are important and leave an impact for our community.

No matter the reason for giving, whether it be for personal fulfillment, a way to say, 'thank you', or for the charitable tax benefits, a planned gift will help to ensure our community has excellent care available for everyone close to home.



To learn more about planned giving to support Winchester District Memorial Hospital and/or Dundas Manor Long-Term Care Home, please contact, Erin Kapcala, Manager of Major and Planned Giving for the WDMH Foundation at 613-292-7468 or ekapcala@wdmh.on.ca.

All communications will remain confidential.



The information and opinions in this guide are obtained from various sources believed to be reliable, but their accuracy cannot be guaranteed. The WDMH Foundation and its employees and agents assume no responsibility for errors or omissions or for damages arising from the use of the published information and opinions. Readers are cautioned to consult their own professional advisors to determine the applicability of information and opinions in any particular circumstances.

Rules relating to taxes sometimes change, and it is best to reach out to the WDMH Foundation and to your financial advisor to confirm current charitable tax benefits.

Community. Care. Close to Home.