

HOW DO I GET STARTED WITH MY LEGACY PLANNING?

1. **Make a list of your assets.** Include investments, properties and any other assets you may have.
2. **Consider you own needs.** Consider your lawyer, accountant and financial planner as part of your trusted team of professional advisors.
3. **Think about your dreams.** Tell your family about your charitable giving and the reason why it is important to you.
4. **Talk to your advisors.** Your financial planner, accountant and lawyer may have ideas how to maximize the benefits to both the organization of your choice and your own estate.
5. **Tell us!** If you choose St. Marys Healthcare Foundation in your will, we would love to know!

Still not sure how to proceed?

Please contact us! We can work with you and your advisors to make sure your legacy of care reflects your priorities. All this is done on a confidential basis. Let us help you make sure your generous gift has a lasting impact!



WHAT CAN I DO TODAY TO GIVE FOR TOMORROW?

Talk with your lawyer, accountant, or financial advisor to learn more about the following ways to make a lasting legacy gift to the Foundation:

- **Bequest in your Will**
- **Gifts of Stocks and Securities**
- **Donations from your RRSP or RRIF**
- **Life Insurance Policy Gifts**
- **Charitable Gift Annuity**
- **Charitable Remainder Trusts (CRT)**

Your thoughtful planning today can create meaningful impact for generations to come.

"We believe a legacy gift of any size is a really satisfying way to ensure our hospital's vital services continue to be available for those we love."

– *Anonymous Giver*



LEGACY GIVING



WHY LEAVE A LEGACY OF GIVING?

When we reflect on our legacy, we often think about the impact we have made on the world and the people around us. For many, giving back to our local community is an important part of life. One meaningful way to ensure our community continues to thrive for generations is through legacy giving to local healthcare.

By making a planned gift to the St. Marys Healthcare Foundation, you help ensure essential programs remain available to those in need – both today and in the future. Your generosity can support the purchase of state-of-the-art medical equipment, strengthen local healthcare services, support local healthcare professionals and keep compassionate care in our community.

We invite you to consider leaving a legacy through the Foundation. Your thoughtful gift can make a lasting difference in the lives of others and leave a legacy that will be remembered for years to come.

"The doctors and nurses at St. Marys Memorial Hospital have provided several generations of our family with wonderful care throughout the years.

My mother was made to feel especially respected by everyone associated with her care during her last few days with us.

Candace and I are happy to, in a small way, help support such a fine institution."

– Jim Sheldon, St. Marys

*Friends,
Family,
Neighbours*



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