

# You Can Make a Lasting Impact to Hospice Peterborough



**HOSPICE**  
PETERBOROUGH

## Future Fund



## Gifts That Provide For The future

Pages 2-3

"I have witnessed the love and compassion that Hospice staff and volunteers provide to individuals, families and friends on that final journey of life. It is wonderful to know that people who care are there for those in need. Hospice is a "legacy" which continues to impact the lives of so many."

- Len L, Volunteer, Board Chair

Keep Hospice Peterborough a sanctuary for residents and their loved ones with gifts in your **Will** and by **bequest**.



## Gifts That Benefit Your Loved Ones

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"I don't know how we would've gotten through my wife's death without Hospice Peterborough. It's the kind of organization that you don't know much about until the time comes that you need them."

- Bill P, husband of resident

Provide for your family as well as Hospice Peterborough with a gift of **life insurance**.



## Gifts That Also Help Today

Pages 5-8

"Hospice Peterborough is very dear to my heart, I've spent my entire life caring for others and I want my legacy to continue my humanitarian work."

- Connie S, volunteer and resident

Give peace to residents and their loved ones with gifts in **memory** and **tribute**.



## Three Options for Gift Giving

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## Your Legacy

To create your legacy for Hospice Peterborough, you can simply sign your name. That's how easy it can be to include a gift in your Will. It costs you nothing now, but your impact goes on for generations.

Leaving a gift to Hospice Peterborough in your estate Will enhances the comfort and improves the quality of life of each client we serve. It also provides respite for caregivers, bereavement care for those left behind, and wellness programs to help families heal.

Once your family and friends are provided for in your Will, please consider making your concern for Hospice Peterborough part of your life story with your legacy gift.

### Your Will

When you remember Hospice Peterborough with a gift in your Will, you make a lasting contribution to our work. Your legacy gift will support the most urgent priorities for Hospice Peterborough.

### Here Are the Ways Most People Like to Make This Lasting Gift:

#### Residual Bequest

Hospice Peterborough receives a percentage of the remainder or residue of your estate after other specific legacies have been fulfilled. This gift will be used where it's needed most. A lot of people prefer to give a residual gift as it keeps in line with inflation and is unlikely to lose value over time.

#### Specific Bequest

Hospice Peterborough receives a specific dollar amount or a gift-in-kind property. A gift of property will be sold, and the proceeds will be used by Hospice Peterborough where it's needed most.

(See Sample Bequest and Codicil Language. Page 6)

## Your Legacy

Now it's easier than ever to create your legacy of care and support for Hospice Peterborough. It takes only a few minutes of your time. It costs you nothing to make this gift that will support Hospice Peterborough for years to come. And it doesn't require assistance from lawyers or advisors (although we encourage you to consult with experts before making any donation). You only need a Registered Retirement Savings Plan, a Registered Retirement Income Fund, or Life Insurance.

### Here's How It Works:

**Step 1:** Request a Single or Multiple Beneficiary Designation Form for your Registered Retirement Savings Plan, your Registered Retirement Income Fund, or life insurance policy from your plan administrator.

**Step 2:** Fill out the form and name Hospice Peterborough as the only or one of the beneficiaries.

**Step 3:** Return the form to your plan administrator.

It's that easy. In just three steps, you can make a gift to Hospice Peterborough that costs you nothing now and will give peace to people and their families at the end of their life.

"There are not enough adjectives of praise that I could share to come close to expressing Vern's **experience of the extraordinary love, commitment, gentleness and fundamental respect** that all staff at Hospice Peterborough showered upon Vern during his final days in this world."

*- Brother-in-law of M. Marosszky*



## Gifts That Benefit Your Loved Ones

You can make a gift that will help to ensure the future of Hospice Peterborough for generations to come and, at the same time, provide for your family and heirs.

### Life Insurance Gifts

A gift of life insurance lets you support Hospice Peterborough in a significant and meaningful way. By paying modest life insurance premiums today and naming Hospice Peterborough as a beneficiary, you can make an impactful gift that will demonstrate your commitment to Hospice Peterborough's work.

One way to leave this gift is to assign Hospice Peterborough as the sole or the co-beneficiary of your existing policy or the life insurance policy from an employer. Your estate will receive a tax receipt equal to the direct benefit to Hospice Peterborough. In this way, you create your legacy and benefit your heirs through a significant tax reduction.

A second option is to purchase a new policy, name Hospice Peterborough as owner and receive tax receipts, during your lifetime, for any premiums paid after the date of transfer.

"We have so much gratitude for the care our whole family received – when Dad stayed in the residence. Mom stayed with him 24-7 and **staff even brought in a double-sized hospital bed so they could sleep beside each other**. Staff provided Mom with a shoulder to cry on as well as professional grief support."

*- Siblings, Rich L, Sherri K and Kim M*



## Gifts That Help Now

You have even more options available to create your legacy for Hospice Peterborough. Your generosity will safeguard Hospice Peterborough's work today and tomorrow.

### Gifts of Stocks and Securities

Donating publicly-traded stocks and securities provides a tax-advantageous way to support Hospice Peterborough. When you make a gift of stocks, you receive a tax receipt for the fully appreciated value of your gift and will not have to pay tax on the realized capital gain. The receipt value will reflect the closing price on the date stocks are received by Hospice Peterborough. The standard capital gain inclusion rate of 50 percent on selling shares is eliminated when you transfer your shares to Hospice Peterborough rather than selling the stocks and donating the proceeds. You may transfer publicly traded stocks and securities electronically from your brokerage account to Hospice Peterborough's brokerage account. Just provide a Letter of Instruction\* to your broker and ask that they transfer your shares to Hospice Peterborough.

\*See Letter of Instruction. Pages 7-8

### Gifts in Memory and Tribute

A memorial or tribute gift to the work of Hospice Peterborough is a meaningful way to express your love, admiration, and gratitude for someone special. Your gift will honour your loved ones, create a lasting tribute to them, and connect both of you through your shared concern for Hospice Peterborough's work.

When you make a gift in your Will to Hospice Peterborough, you can do it in memory or in honour of someone important to you. It will stand as your legacy and your loved one's legacy for generations to come.

### Gifts from Donor Advised Funds

Donor-advised funds (DAFs) are one of the most convenient ways to support a cause you care about while maintaining the flexibility you desire. A DAF is a little like a personal charitable savings account. It allows you to make a charitable contribution (into your DAF account), receive an immediate tax deduction and then make gifts (recommend grants) over time to your favourite charities – like Hospice Peterborough.

# Sample of Bequest Language

## (For A New Will)

I hereby give, devise and bequeath \$ \_\_\_\_\_ OR \_\_\_\_ % of the residue of my total estate] OR \_\_\_\_ all of the residue of my total estate] to Hospice Peterborough for its charitable uses and purposes.

# Sample Codicil Language

## (Ammendment to An Existing Will)

This is a codicil to my last will and testament.

I hereby give, devise and bequeath \$ \_\_\_\_\_ OR \_\_\_\_ % of the residue of my total estate] OR \_\_\_\_ all of the residue of my total estate] to Hospice Peterborough for its charitable uses and purposes.

In all other respects I ratify and confirm all of the provisions of my said last Will and Testament dated on the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

IN WITNESS\* WHEREOF, I sign, publish and declare this instrument to be a Codicil to my last Will and Testament in the presence of the persons witnessing said Codicil at my request this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
(Grantor's signature)

\_\_\_\_\_ residing at \_\_\_\_\_  
(Grantor's name)

Witnesses: \*Note that witnesses must not be a beneficiary of the estate, must be over age 18 and must observe the Grantor sign the codicil.

\_\_\_\_\_ residing at \_\_\_\_\_  
(\*Witness 1 name)

\_\_\_\_\_ residing at \_\_\_\_\_  
(\*Witness 2 name)

# Letter of Instruction for Transfer of Stocks and Securities

## To donate your gift of stock to Hospice Peterborough, please follow these four steps:

**Step 1:** Complete the attached transfer form including CUSIP# which will be provided by your broker or investment advisor of the assets being transferred. In order to make sure you receive your official receipt for income tax purposes, please email, fax or mail a copy of this form to:

Manager of Development  
email: [legacy@hospicepeterborough.org](mailto:legacy@hospicepeterborough.org)  
phone: 705-742-4042  
fax: 705-742-0064  
address: 325 London St., Peterborough, ON K9H 2Z5

Please note that forms sent by mail will delay the start of the transfer process and may affect the ultimate receipt value. Please notify Hospice Peterborough by telephone or email if you have sent your forms by mail.

**Step 2:** To initiate your transfer, please forward a copy of the completed transfer form to your broker/investment advisor. Your broker can arrange for the electronic transfer of shares to our RBC Dominion Securities account:

Account Number: 511-17809-01-1

**Step 3:** Please inform Hospice Peterborough once the transfer has been completed. Unexpected and or unidentifiable transfers may make it difficult for Hospice Peterborough to promptly issue the appropriate tax receipt.

**Step 4:** Please be advised that the value of the donation receipt will be based on the closing price of the shares on the day before the securities are received by Hospice Peterborough in accordance with the Hospice Peterborough Financial and Investment Policy.



## Donation of Publicly Traded Securities to Hospice Peterborough

# Letter Of Direction and Authorization re: Transfer Of Securities

Name of Donor: \_\_\_\_\_

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

Home Telephone: \_\_\_\_\_

Name of Institution Transferring Stock: \_\_\_\_\_

Account Number at Delivering Institution: \_\_\_\_\_

Symbol for the Securities on the Exchange: \_\_\_\_\_

Exchange on which the Securities are Traded: \_\_\_\_\_

Number of Shares/Units: \_\_\_\_\_

### PROCESS FOR MAKING A DONATION OF SECURITIES:

Please instruct your broker to contact RBC Dominion Securities at (705) 743-3018. Ask your broker to transfer your publicly traded securities to the Hospice Peterborough account 511-17809-1-1- CUID# DOMA DTC# 5002 with RBC Dominion Securities, Peterborough, ON.

The date of your donation will be the date the securities are deposited in good delivery into Hospice's RBC Dominion Securities account. The securities will be valued using the price at the close of trading the previous day. This will be the amount used for the charitable receipt for income tax purposes.

Upon valuation of your gift, a copy of this form will be returned to you indicating the value of your tax receipt.

\_\_\_\_\_  
Signature of Donor

\_\_\_\_\_  
Date

Date Received: \_\_\_\_\_

Value of Gift: \$ \_\_\_\_\_

Approved by: \_\_\_\_\_

Branch Manager  
Peterborough and Cobourg Branch  
RBC Dominion Securities Inc.  
60 Hunter St. E.  
Peterborough, ON K9H 1G5  
705-743-4275

# One Fund - three options to give.



**The first option is to give directly to Hospice Peterborough.** Gifts to the Future Fund will be used to support residents or to fund grief and bereavement programs or community programs to help people dying at home or in the hospital.

You know that the new Hospice Peterborough's Care Centre was just the first step in a long journey to support residents. Your heart might say reinvesting in the building or equipment is your best choice.

You might have a specific interest in helping children recover from the loss of a parent. Wherever your heart is called, we can plan your gift with you to use it precisely as you wish.



**The second option is to make a gift to Hospice Peterborough through RBC Dominion Securities.** You can make your gift with many types of public securities today or in the future. You can work with your financial planner or lawyer to plan a gift for today or the future by donating securities through RBC Dominion Securities.

While preparing this gift with your advisors, please work with our team to ensure your donation is used exactly as you wish.

**The third option is to establish a fund for Hospice Peterborough with the Community Foundation of Greater Peterborough.** This is a great option if you want to invest your capital and have the interest support Hospice Peterborough yearly. Greater Peterborough



The Community Foundation makes this process simple and straightforward.

## Mission

**The mission of Hospice Peterborough is to enhance the comfort, dignity and quality of life of individuals and families living with or affected by life-threatening illness or grief.**





“My experience at Hospice made me not afraid to die, and when I’m gone **I want Hospice to be there for my wife too.**”

- *Bob N, resident*



“My world was taken away. I wouldn’t have gotten through my husband’s death without Hospice. **I want this place to be there for my kids and grandchildren too.**”

- *Wilma B, bereavement Program recipient*



“Hospice Peterborough is a wonderful place where everyone was so kind, caring and thoughtful. My wife spent six weeks there. I was able to visit every day, even throughout COVID. **Everyone should have this option at end of their life.**”

- *Grant P, husband of resident*



**For more information about how  
you can leave a legacy, please contact:**

**Manager of Development**

Hospice Peterborough

325 London Street

Peterborough, ON K9H 2Z5

**PHONE:** 705-742-4042 **FAX:** 705-742-0064

**EMAIL:** [legacy@hospicepeterborough.org](mailto:legacy@hospicepeterborough.org)

**[www.hospicepeterborough.org](http://www.hospicepeterborough.org)**