



HOSPICE GEORGIAN TRIANGLE
FOUNDATION

YOUR **LEGACY** OF COMPASSION



A gift in your Will is one of
the most meaningful ways
to care for the people and
causes that matter most to you.

Planning today.
Caring for tomorrow.

Ensuring compassionate
hospice palliative care for
future generations throughout
South Georgian Bay.



Dear Friend,

Thank you for taking the time to learn more about leaving a legacy gift to Hospice Georgian Triangle through The Hospice Georgian Triangle Foundation.

Planning your estate is one of the most thoughtful things you can do for your loved ones. It is also an opportunity to reflect on the values that have shaped your life and the impact you hope to leave for future generations.

Every day, Hospice Georgian Triangle provides compassionate care to individuals and families facing life-limiting illness at no cost. Whether receiving care at Campbell House or through community-based hospice and grief and bereavement services, patients and families find comfort, dignity, and support during some of life's most difficult moments.

A gift in your will helps ensure these services remain available for years to come.

Thank you for considering Hospice Georgian Triangle as part of your legacy. I would be pleased to answer any questions you may have in complete confidence.

With sincere gratitude,



A handwritten signature in black ink that reads "Sandra Sullivan".

Sandra Sullivan
Executive Director
Hospice Georgian Triangle Foundation



Why your legacy matters

Hospice care is about living every moment with dignity, comfort, and compassion.

Your future gift helps ensure future generations have no-cost access to:

- Compassionate end-of-life and respite care at Campbell House
- Community hospice programs
- Grief and bereavement services
- Emotional and practical support for families
- Volunteer programs
- Education and outreach initiatives
- Innovative approaches to end-of-life and hospice palliative care

A future gift today helps ensure Hospice Georgian Triangle is here to walk alongside our patients and their families for years to come.



Leave a legacy of compassion

A gift in your Will is one of the most meaningful ways to ensure compassionate hospice palliative care remains available for future generations in South Georgian Bay.

By including Hospice Georgian Triangle Foundation in your estate plans, you are creating a lasting legacy of comfort, dignity, and support for individuals and families when they need it most.

Legacy gifts can take many forms, including:

- A gift in your Will (bequest)
- A gift of publicly traded securities
- A gift of life insurance
- A gift of RRSP or RRIF funds
- Other planned giving options

When you notify us of your legacy gift, you will be welcomed as a member of the Susie Newton Society, recognizing your commitment to ensuring compassionate care for generations to come.

Recognition is always optional, and we are happy to honour your wishes if you prefer to remain anonymous.

Estate Planning Checklist

Creating or updating your estate plan can give you and your loved ones peace of mind.

Here are a few items to consider:

- ✓ Prepare or update your will.
- ✓ Choose an executor you trust.
- ✓ Review your beneficiaries.
- ✓ Consider powers of attorney for property and personal care.
- ✓ Organize important financial and legal documents.
- ✓ Discuss your wishes with your loved ones.
- ✓ Speak with your lawyer and financial advisor.
- ✓ Consider whether you would like to include a charitable gift in your estate plans.
- ✓ Review your plans every few years or after major life events.

Ways to leave a legacy

There are many ways to support Hospice Georgian Triangle through your estate.

Getting started guide

Three Simple Steps to Leave a Legacy

1. Consider the gift that is right for you
2. Decide whether you would like to leave a percentage of your estate, a specific amount, a particular asset or a contingent gift.
3. Speak with your professional advisor
4. Ask your lawyer, financial planner, or accountant to help ensure that your gift reflects your wishes and aligns with your overall estate plan.
5. Let us know, only if you are comfortable
6. You are not required to tell us about your gift. However, informing us allows us to thank you, understand your wishes and welcome you into our legacy community.

Potential tax benefits

A charitable gift made through your estate may generate a charitable donation receipt that can help reduce taxes payable by your estate. The tax treatment will depend on the type of gift, the timing of the transfer and your individual circumstances.

Certain gifts, including publicly traded securities, may receive additional tax advantages. Your lawyer, accountant, or financial advisor can help determine the most appropriate structure for your estate plan.

A percentage of your estate

You may choose to leave a percentage of the residue of your estate after other obligations have been met.

This option allows your gift to keep pace with changes in the value of your estate over time.

A specific dollar amount

You may choose to leave a fixed amount to The Hospice Georgian Triangle Foundation.

A particular asset

Some donors choose to leave:

- Publicly traded securities
- Real estate
- Investment accounts
- Other valuable assets



A contingent gift

A contingent gift only takes effect if your primary beneficiaries are no longer living.

Beneficiary designations

Depending on your circumstances, you may also choose to name Hospice Georgian Triangle Foundation as a beneficiary of:

- RRSP
- RRIF
- TFSA
- Life insurance policy

Your professional advisors can help determine the most appropriate option for you.

“Kate & I just redid our wills to make sure everything was up to date, including our legacy gifts. It was an easy task overall. The review of our plan for bequests to family was followed by decisions that our executor will implement legacy gifts to hospice and other foundations we now support. It is very pleasing to know that giving to our community will continue through our legacy gifts long after we have left this world.”

Rowland Fleming

Susie Newton Society Member





What happens when you tell us about your gift?

When you notify us of your intention:

- Your information is treated confidentially.
- You decide how much information to share.
- You are under no obligation to disclose the value of your gift.
- Your intention remains completely revocable.
- We will confirm the correct legal name and charitable registration number.
- We will discuss any specific purpose you would like your gift to support.
- We will honour your recognition and privacy preferences.
- You may change your plans at any time.

Frequently Asked Questions

Why should I consider a gift in my will?

A gift in your will allows you to make a lasting impact while ensuring your loved ones are cared for first. It is often one of the simplest and most flexible ways to support a cause, or a few, you value.

Can I change my mind?

Yes. Your will can generally be updated whenever your circumstances or wishes change by connecting with your lawyer.

Does my estate have to be large?

Legacy gifts of every size make a meaningful difference. At Hospice Georgian Triangle, we value all gifts and your choice to support compassionate hospice care in our community.

Will my gift really make a difference?

Absolutely. Every legacy gift helps ensure compassionate hospice palliative care remains available close to home for future generations. Your generosity provides comfort, dignity, and support to individuals and families when they need it most.

Can I leave a charitable bequest and still provide for my loved ones?

Absolutely. Many donors choose to provide for family members first while leaving a portion of their estate to a charitable organization of their choice.

Frequently Asked Questions

Will my gift be kept confidential?

Yes. Any conversations with Hospice Georgian Triangle Foundation will be treated confidentially and in accordance with our privacy practices. We value and respect your privacy.

I don't have a will yet. Is it too early to think about a legacy gift?

Not at all. Creating a Will is an important step in protecting your loved ones and ensuring your wishes are respected. Including a charitable gift is entirely optional, but many people choose to support a cause that has been meaningful in their lives while planning for the future. Contact your advisors to learn more.

What happens if I already have a will?

Your lawyer can often add a charitable gift by preparing a simple codicil or by updating your will

Suggested Wording

Please discuss the following wording with your lawyer.

"I direct my Estate Trustee to deliver, pay or transfer \$, % (or name of asset) to The Hospice Georgian Triangle Foundation (Charitable Registration Number: 831085089 RR0001) for the purpose of supporting Hospice Georgian Triangle's highest priority needs."



HOSPICE GEORGIAN TRIANGLE
FOUNDATION

We're Here to Help

Planning your legacy is a personal decision.

If you're considering including Hospice Georgian Triangle Foundation in your estate plans, we would be pleased to speak with you confidentially and answer any questions you may have.

Sandra Sullivan

Executive Director

Hospice Georgian Triangle Foundation

Phone: (705) 444-2555 Ext. 7521

Email: SullivanS@hospicegt.com

Thank You!

Your generosity creates a lasting legacy of compassionate hospice care for generations to come.

Together, we can help ensure every person in South Georgian Bay receives comfort, dignity, and compassionate care when they need it most.



Legacy Gift Intention Form

Thank you for letting us know that you have chosen to include Hospice Georgian Triangle Foundation in your estate plans. Your future gift will help ensure compassionate hospice palliative care continues for generations to come. Declaring your legacy or planned gift will make you a member of the Hospice Georgian Triangle

Suzie Newton Society.

Completing this form is voluntary and helps us understand your intentions, express our gratitude, and ensure we can honour your generosity according to your wishes. This form is an expression of current intentions and is not legally binding.

Donor Information

First Name: _____ Last Name: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Email: _____ Phone: _____

Preferred Method of Communication: ☐ Phone ☐ Email ☐ Mail

Legacy Gift Intention: ☐ I have included Hospice Georgian Triangle Foundation in my will or estate plans

Type of Gift: ☐ Percentage of my estate ☐ Residual gift (all or a portion of the remainder of my estate)
☐ Specific dollar amount ☐ Beneficiary designation (e.g. RRSP, RRIF, TFSA, life insurance)
☐ Other: _____
☐ I do not wish to share the details of my gift

Optional Gift Details:

☐ Estimated percentage: _____ % **or** ☐ Estimated value: \$ _____

Recognition Preferences:

☐ I am comfortable being publically recognized ☐ I would prefer to remain anonymous
☐ I would like to discuss recognition opportunities

Signature: _____ **Date:** _____

Please Email this form to Sandra Sullivan at sullivans@hospicegt.com