Legacy Giving and Estate Planning: A Community Built on Care

WRHN FOUNDATION
Waterloo Regional Health Network

There are many ways to make a meaningful difference in the future of health care while planning for your financial future.

By thoughtful charitable giving, you can support the health and well-being of your family, friends and neighbours through Waterloo Regional Health Network (WRHN), while exploring giving options that align with your personal values, financial goals and plans for your estate.

Today, 1.4 million people—10% of Ontario's population—rely on WRHN for care. As our region grows, so does the need for expanded hospital capacity, specialized services and innovative approaches to care. With plans for a new state-of-the-art acute care hospital by 2035, WRHN is reimagining health care to serve a growing population expected to reach 2 million.

With the right planning, your gift can create a lasting impact while potentially offering tax advantages and helping you balance your charitable intentions with the needs of your loved ones.

Creating a charitable gift of any size in your Will for the **Waterloo Regional Health Network Foundation** ensures future generations receive the care, compassion, and innovation they deserve.

It is a simple, meaningful way to protect your community's future while leaving a legacy that reflects your personal values.



Types of Bequests

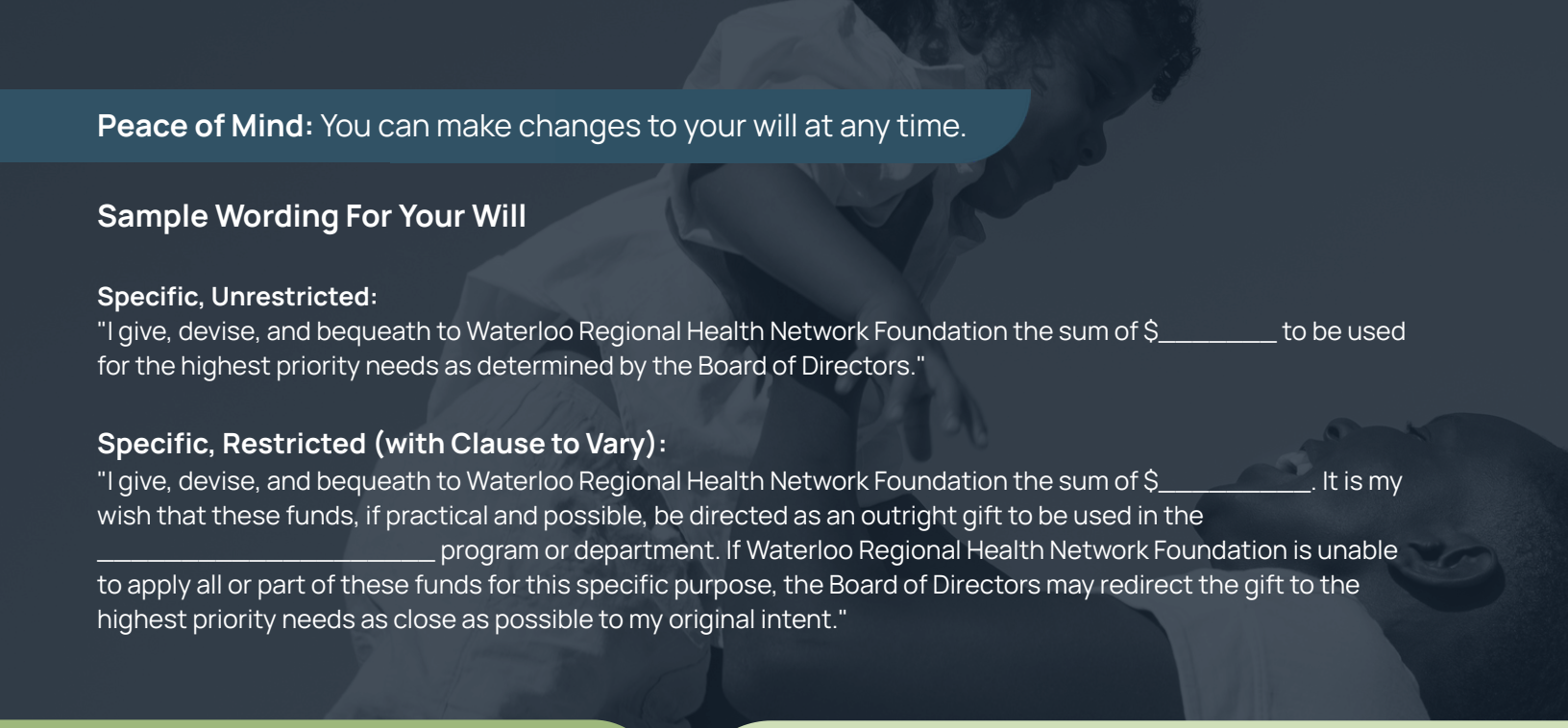
Specific Bequest: A gift of a designated dollar amount, property, or specific asset.
Residual Bequest: A gift made from the remainder of your estate after all specific gifts, taxes, and administrative expenses are paid. As your financial circumstances change, the proportion left to charity automatically adjusts without needing to modify your Will.

The Impact of a Gift in Will

Flexibility:
You retain full ownership and use of your assets during your lifetime, ensuring your standard of living remains completely unaffected.

Comfort:
Tax credits generated by a bequest can significantly reduce the final income taxes owed by your estate, maximizing what you pass on to your heirs.

Fulfilment:
Your gift can serve as a meaningful tribute to honor your life, your family, or a loved one who made a difference in your world.



Peace of Mind: You can make changes to your will at any time.

Sample Wording For Your Will

Specific, Unrestricted:
"I give, devise, and bequeath to Waterloo Regional Health Network Foundation the sum of $_____ to be used for the highest priority needs as determined by the Board of Directors."

Specific, Restricted (with Clause to Vary):
"I give, devise, and bequeath to Waterloo Regional Health Network Foundation the sum of $_____. It is my wish that these funds, if practical and possible, be directed as an outright gift to be used in the _____ program or department. If Waterloo Regional Health Network Foundation is unable to apply all or part of these funds for this specific purpose, the Board of Directors may redirect the gift to the highest priority needs as close as possible to my original intent."

Residual, Unrestricted:

"I give, devise, and bequeath to Waterloo Regional Health Network Foundation ____% of the residue of my estate to be used for the highest priority needs as determined by the Board of Directors."

Residual, Restricted (with Clause to Vary):

"I give, devise, and bequeath to Waterloo Regional Health Network Foundation ____% of the residue of my estate. It is my wish that these funds, if practical and possible, be directed as an outright gift to be used in the _____ program or department. If Waterloo Regional Health Network Foundation is unable to apply all or part of these funds for this specific purpose, the Board of Directors may redirect the gift to the highest priority needs as close as possible to my original intent."

Note:
These sample clauses are provided for reference only. Waterloo Regional Health Network Foundation strongly recommends consulting a legal or estate planning professional to ensure your Will reflects your exact wishes and complies with current laws.

We are here to help
Whenever you wish to explore your options or ask questions, we are here to support you with care and confidentiality.

For more information, **please visit www.wrhnf.ca/donate/legacy-giving** or contact the Waterloo Regional Health Network Foundation at 519-749-6797 or info@wrhnf.ca.

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