

Estate Giving Checklist

Planning Your Gift

Thinking about leaving a gift in your will or estate? Use this checklist to guide you confidently through the basics of future giving and to help you strengthen health care in our community.

1. Reflect on Your Values

- What areas of care or programs matter most to you?
- Do you want your gift to support specific projects or the hospital's greatest needs?
- Would you like your bequest to be used immediately or over time?

2. Review Your Financial Picture

- Take stock of your assets: property, savings, investments, insurance, and other holdings
- Ensure loved ones are provided for first
- Decide whether your gift will be:
 - through your will as a set amount, percentage, or the residue of your estate
 - outside your will via beneficiary designation, trust, or donor advised fund

3. Learn About Your Giving Options

- Include a bequest in your will – a percentage, specific amount, the residue, or real estate
- Name the foundation as a beneficiary of your RRSP, RRIF, TFSA, pension or life insurance policy
- Consider a donor-advised fund for long-term giving

4. Talk with Your Advisors

- Consult your lawyer, financial planner, and tax professional
- Ask how to structure your gift for optimal tax advantage



Estate Giving Checklist

5. Inform the Foundation

- Let the KGH Foundation know about your plans (confidentially, if you prefer)
- We will ensure your wishes are recorded, clearly understood, and will be acknowledged appropriately.

6. Keep Plans Current

- Review your will or estate plan every few years or after major life changes
- Ensure the KGH Foundation's name, contact details, and charitable registration number are correct.

Your Vision, Your Impact

Your gift will sustain quality care and insure innovation remains close to home for our community's future generations.

Robert Hamanishi, Director of Planned Giving

robert.hamanishi@interiorhealth.ca | 250-862-4300 x. 27011 | kghfoundation.com



Giving **Changes** Everything.