

## Future 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 (DAF) 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

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### 5. Inform the Foundation

- Let the KGH Foundation know about your plans – your confidentiality is assured and anonymity is honoured
- 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 health care and insure innovation remains close to home for our community's future generations.

Planning today for a future gift allows you the satisfaction and joy in determining your impact and generosity in support of healthcare – speak with us today.

Robert Hamanishi, Director of Planned Giving

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*Thank you for considering a gift to the KGH Foundation to help shape the future of health care for generations to come.*

Legal Name: **Kelowna General Hospital Foundation**

Charity Registration # **11897 8733 RR0001**