

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



Giving Changes Everything.

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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**



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