



Heart
&Stroke™

Thinking of creating a gift in your Will?

A legacy gift, such as a gift in your Will, is an enduring statement about the values that you hold dear. When you create a gift in your Will to Heart & Stroke, you share your hope, support and vision of a future free of heart disease and stroke. You make a truly incredible gift benefiting friends, neighbours, loved ones and future generations of Canadians.

Do you want to help create a healthier future?

Every legacy gift to Heart & Stroke – whether large or small – has an impact on the lives of people just like you. It means so much that you are considering a gift in your Will, and we are honoured to hold such a place in your heart. Know that a legacy gift to Heart & Stroke is a gift for a healthier future. It is a gift of life.

Here are answers to some common questions about creating a gift in your Will for Heart & Stroke.

Concerned you might not have enough to provide for a gift in your Will?

Sometimes, people are unsure whether they will have enough to provide for their loved ones and create a legacy gift for the future. If this is a concern for you, there's a way to make sure your loved ones receive what you intend and fulfil your charitable wishes.

A **residual gift** can be made from what is left of your estate *after* all debts and specific gifts to loved ones have been paid, and it may be the best option for you. You receive a charitable tax receipt for the full amount of your gift which may be beneficial to your loved ones when applied to the tax filings of your estate.

Some choose to give all the residue of their estate to the cause they care about. Others imagine Heart & Stroke as an additional loved one and divide the remainder between the people and charities they wish to support.

Whatever you choose, your gift will make a difference for research, support, and care for those affected by heart disease and stroke.

Sample wording for a residual gift of the full balance of what is remaining:

To pay and transfer the residue of my estate to Heart and Stroke Foundation of Canada – Charitable Registration # 10684 6942 RR0001.

Sample wording for a residual gift of a portion of what is left of your estate:

*To pay and transfer _____ of the residue of my estate to Heart and Stroke
of parts, %, or share
Foundation of Canada – Charitable Registration # 10684 6942 RR0001.*



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Heart and Stroke Foundation of Canada – Charitable Registration #: 10684 6942 RR0001

This material provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a strategy that achieves their objectives.

Do you already have a specific gift in mind?

If you prefer to specify a dollar amount, or another type of asset such as securities, you may prefer to create a **specific gift** in your Will.

Sample wording for a specific gift of cash:

To pay the sum of \$ _____ to Heart and Stroke Foundation of Canada – Charitable Registration # 10684 6942 RR0001.

Sample wording for a specific gift of securities:

To pay, transfer and assign to Heart and Stroke Foundation of Canada - Charitable Registration # 10684 6942 RR0001 _____ shares of _____.
of units Name of security

Do you have the correct information for your lawyer or estate planner?

Correctly naming beneficiaries in your Will is critical to ensuring your gift will be used as you intend.

Please use the following information to create a legacy gift to Heart & Stroke:

Legal Name: Heart and Stroke Foundation of Canada
1200-2300 Yonge Street, Box 2414, Toronto ON M4P 1E4
Charitable Registration #: 10684 6942 RR0001

Will you help us understand and fulfil your wishes?

Creating a legacy for the future is a very personal decision, and we understand that. Still, we can best achieve the impact you desire for your legacy when we know about your wishes. Letting us know about your wishes doesn't mean you cannot change your mind about your gift. You are always free to make changes to your plans. And rest assured, we value your privacy and never share your personal information.

We'd also really like to thank you for being someone who cares so much about the lives of others — even people you've never met.

Do you have any other questions?

For further details about how **your legacy can help fund vital research, provide support to people in Canada affected by heart disease and stroke, and promote healthier lives for generations to come**, contact Mary Goodfellow any time at 1-800-205-4438 or mary.goodfellow@heartandstroke.ca.

And remember, getting advice from a lawyer or estate planner is the best way to ensure your legacy can be carried out as you wish.

Thank you for considering a legacy gift in your Will to Heart & Stroke.
heartandstroke.ca/legacy



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