



A Bequest Gift in Your Will

A charitable gift in your Will — of any size — is a meaningful way to support the Hôtel-Dieu Grace Healthcare (HDGH) Foundation and ensure compassionate care continues for generations to come.

A bequest is a simple direction in your Will that allows you to leave a specific amount, a percentage of your estate, or particular assets to the Foundation. It is an easy and flexible way to make a lasting impact.

In addition to supporting the individuals and families we serve, a charitable bequest may provide significant tax savings to your estate, potentially reducing or eliminating your income tax in the year of death and maximizing the impact of your generosity.

Things to Consider When Creating Your Gift

Specific Bequest: A gift of specific property, securities, or cash.

Residual Bequest: What remains after taxes, administrative expenses, and your heirs have received their gifts. This option adjusts automatically as your circumstances change.

Contingent Bequest: Takes effect only if a specified event occurs (e.g., if a spouse does not survive you).

Sample Wording

Unrestricted Gift

"I give, devise, and bequeath to the Hôtel-Dieu Grace Healthcare Foundation the sum of \$_____ (or ____% of the residue of my estate) to be used for any purpose approved by the Foundation."

Restricted Gift (with clause to vary)

"I give, devise, and bequeath to the Hôtel-Dieu Grace Healthcare Foundation the sum of \$_____ to be used for the following purpose(s): _____. If these funds cannot be fully applied for the stated purpose (s), the Foundation may redirect them to a purpose as close as possible to my original intent."

We recommend sharing the following sample wording with your legal advisor when preparing your will. The above is provided as sample wording only.

Please consult your financial, legal, or insurance advisor to ensure your plans reflect your personal goals and tax considerations, and that your family's needs are met.

To learn more about creating your legacy, please contact
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Benefits of a Gift in Your Will

Control: You retain use of your assets during your lifetime.

Comfort: Reduce final taxes on your estate, benefiting your heirs.

Fulfillment: Create a lasting memorial for yourself or someone you love.

Peace of Mind: You can revise your Will at any time.