



University Hospital Foundation

MAKE YOUR WILL
A WAY TO SAVE A LIFE



What can **YOUR WILL DO?**

By supporting our doctors and researchers you'll be opening doors to a whole new world.

One where Alzheimer's disease is treatable. Patients with severe spinal cord injuries may walk again. And diagnosing even the most complex conditions anywhere in the human body is faster and more accurate.

However, as we've seen in the past, there will be more daunting medical challenges for coming generations to battle. And as healthcare costs escalate, the need for community support will continue to rise.



PLANNED GIFTS HAVE HELPED BRING INCREDIBLE....

... advancements to the University of Alberta Hospital, such as incision-free brain surgery and world class cardiac care, a gift in your will can do the same.

Donor SPOTLIGHT

When he was 43, Michael Lifeso had a heart attack.

Shortly after his recovery, his lungs began to fail – eventually to the point where they stopped working.

His parents, Clayton and Betty, were told their son did not have long to live.

As a last resort, Michael was put on life support at the Mazankowski Alberta Heart Institute (Maz), which kept him alive until he received a successful double-lung transplant, also at the Maz.

Today, Michael is very much alive, making the most of his second chance at life.

For Clayton and Betty, their son's ordeal was an eye opening experience they wish they never had – but they are grateful for the care he received.

"We had no idea community support plays such a role in healthcare," said Betty. "It's very likely Michael would not be with us without it."

Generous donations to the University Hospital Foundation, including many from people who left gifts in their wills, equipped the Maz with the advanced life support equipment needed to keep Michael alive, and supported the expansion of the cardiovascular intensive care unit where he stayed before and after his surgery.

"The decision to leave a gift in our wills to the University Hospital Foundation was easy when we saw the impact we could have," said Clayton. "Because it's in our will, we can give more than we normally could, and have an even greater impact."

"We want to make sure that the level of care that saved Michael is still there for our grandchildren, our great-grandchildren, and for everyone else in the community who may need it."

Clayton and
Betty Lifeso



“ We are so fortunate to live in a place with such an outstanding level of care across every part of the hospital. ”



Since 1906, the University of Alberta Hospital has played a pivotal role in the healthcare of Albertans and western Canadians.

It's also been home to some of the most significant innovations and breakthroughs in modern medical history:

1956 Dr. John Callaghan performs the first successful open heart surgery in Canada.

1962 The hospital introduces long term hemodialysis for patients living with kidney failure – a first in Canada.

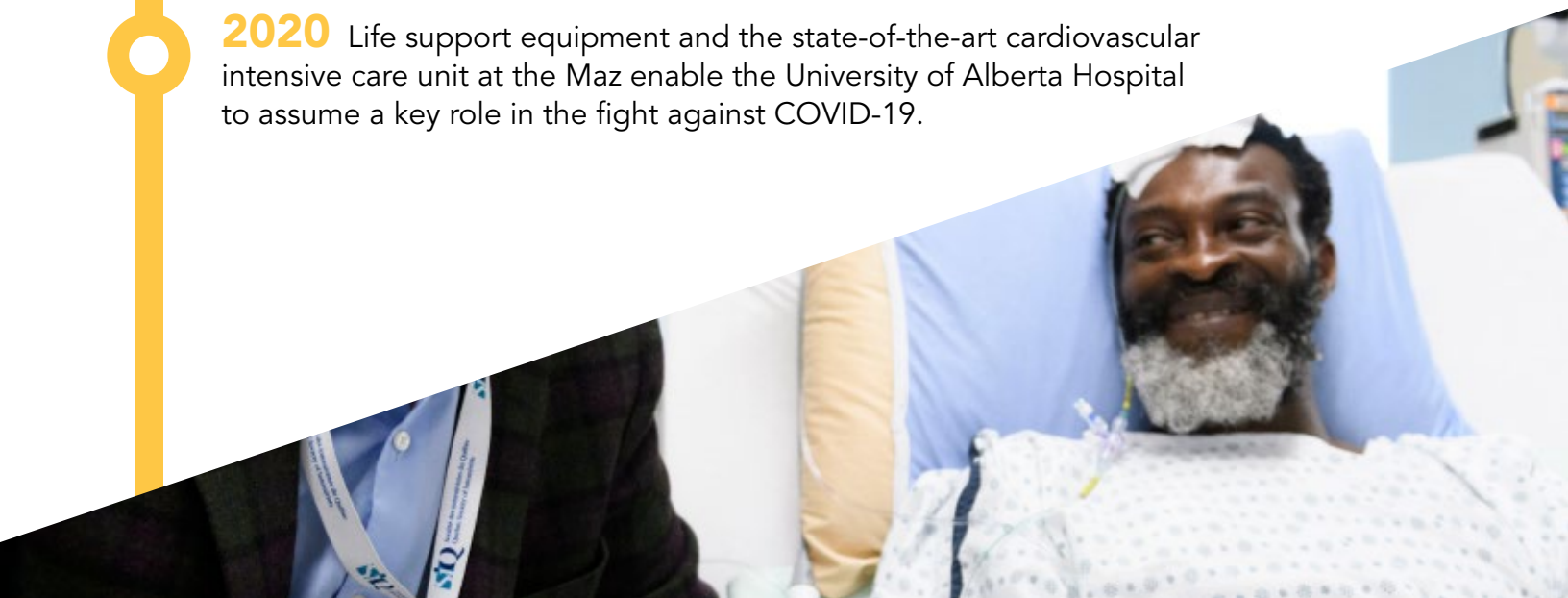
1986 Canada's first intensive care unit dedicated to patients with life-threatening conditions of the brain and spinal cord opens.

1999 The Edmonton Protocol, a procedure for transplanting islet cells for patients with diabetes, receives worldwide recognition.

2009 Opening of the Mazankowski Alberta Heart Institute, making the University of Alberta Hospital site home to world class cardiac patient care, research and innovation.

2019 Successful completion of the \$70 million Brain Centre Campaign – bringing such eye-popping innovation as incision-free brain surgery and Canada's first stroke ambulance to Edmonton.

2020 Life support equipment and the state-of-the-art cardiovascular intensive care unit at the Maz enable the University of Alberta Hospital to assume a key role in the fight against COVID-19.



Getting **STARTED**

For many of us, it's important to know that we've made a difference; leaving the world a better place for our loved ones when we are gone. By including a bequest or other legacy gifts as part of your estate plan, you will help to ensure that future generations continue to benefit from the latest advancements in care.

Without a will, provincial law dictates who receives your estate and in what proportions. If you die without a will, you have no control over who will inherit your property. Under Alberta's *Wills and Succession Act*, your estate will be distributed according to a single, specific formula that is applied to everyone.

We recommend that you work with a lawyer when preparing your will, and consult with your accountant or financial planning advisor when making your estate plans. This will help to ensure that your intentions are clear and take into account the most current tax and estate laws.

We would be pleased to provide some samples that may be helpful to you and would also be happy to work with you or your advisor in choosing wording that best addresses your charitable intentions. We also encourage you to include both our legal name (University Hospital Foundation) and our charitable registration number (88900-3240 RR0001).

Charitable tax receipts are issued for gifts received through charitable bequests.

We would be honoured to meet with you to discuss your charitable intentions and assist you in creating a meaningful legacy.

A Lifesaving Mission

Together, researchers and surgeons, Dr. Freed and Dr. Nagendran have created a system called EVOSS (Ex-Vivo Organ Support System). This machine, which looks a bit like a mini refrigerator, mimics how humans breathe and keeps lungs alive outside the body, increasing organ quality and availability.

Thanks to funds from donors like Dow Hicks – who left a gift in his will to the University Hospital Foundation in support of the lung transplant and medical research

program at the University of Alberta Hospital – 12 patients received successful lung transplants in the first in human clinical trial.

This lifesaving technology is revolutionizing transplantation around the world. These same innovators won a NASA iTech Ignite the Night Pitch Competition and will compete in NASA's iTech Cycle Forum, which brings together the world's top 10 innovators to explore applications for their technology in space.



Ways to **LEAVE A LEGACY**

GIFT IN YOUR WILL

Remembering the University Hospital Foundation (UHF) in your will is an act that is generous, powerful, and surprisingly simple. It allows you to leave a larger gift than would be possible during your lifetime, while still retaining control of your assets.

One of the great benefits of leaving a legacy gift, is that there is no immediate cost to you. You can bequeath a piece of property or other tangible assets, securities, cash, or even a percentage of your estate. Gifts made through your will can also serve to lower or even eliminate taxes owed on your final estate.

You may also choose the purpose for which your gift will be used:

UNRESTRICTED GIFT

Your gift can be directed to support the areas of highest priorities, providing the flexibility to respond to evolving demands and allowing funds to be used where they are most needed.

RESTRICTED

Your gift can be directed to support advancements in a specific area of care or research at the University of Alberta Hospital, the Mazankowski Alberta Heart Institute or the Kaye Edmonton Clinic.

Discuss which options are right for you with your loved ones and financial advisor.



SECURITIES

When you make a gift of securities – like stocks, mutual funds or bonds – to UHF, you're saving lives in a way that has immediate impact. Eliminate the capital gains tax that you'd have to pay if you sold the securities and then donated the proceeds, plus receive a charitable tax receipt for your donation. You can give now, or as part of your estate planning.

LIFE INSURANCE

A gift of life insurance, whether it's an existing policy or a new one, can turn your small monthly premiums into a significant donation. Working with your financial planner, you can set up a life insurance gift that supports the Foundation in the future, while you enjoy the tax benefits now.

CHARITABLE ANNUITIES

This allows you to make a gift to the UHF, while at the same time securing guaranteed income for life. An annuity consists of two parts: a gift to UHF, for which you receive a tax receipt, and a guaranteed stream of income for you and your surviving partner.

PROPERTY AND OTHER ASSETS

Gifts of property – also called a "gift-in-kind" – such as real estate, jewelry, vehicles, antiques, art and other tangible assets, can also be left as gifts in your will. This type of donation may be kept and used by the Foundation or sold. A donation receipt is issued based on fair market value as determined by an independent evaluation.

RETIREMENT FUNDS

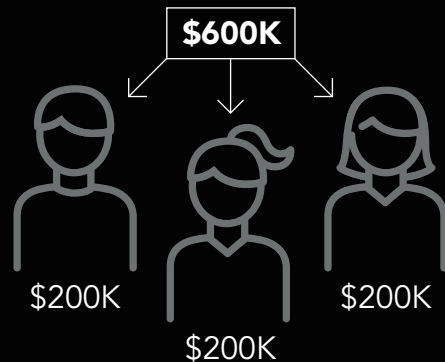
Designating UHF as a beneficiary of your RRSP or RRIF funds is a tax-smart way to leave a lasting legacy. You'll retain ownership of your funds now, while your estate benefits from a tax receipt for the value of your gift later. This type of gift will also help you avoid probate fees. Donate all or simply a portion – it's up to you.

DID YOU KNOW?

A legacy gift can benefit you, your family and the cause that matters to you.

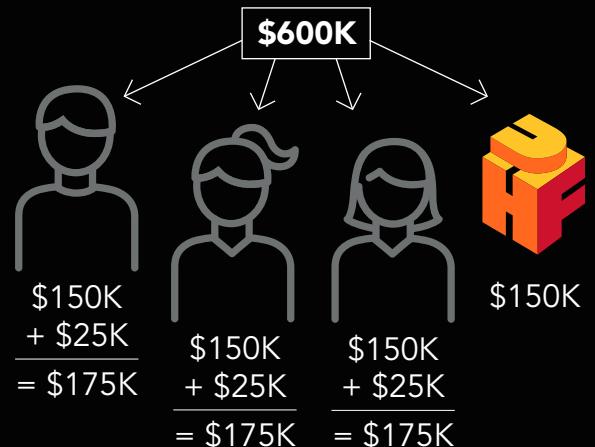
STANDARD WILL

In a standard will, your \$600K estate gets divided equally between your surviving children.



INCLUDING UNIVERSITY HOSPITAL FOUNDATION IN YOUR WILL

When you include a bequest for the UHF in your will, the value of your estate increases from \$600K to \$675. The charitable tax receipt gives back \$25K to each child.



This illustration should not be construed as tax or legal advice. Please consult your financial and legal advisors to discuss tax effective ways to make a charity part of your estate plan

Whether through a gift in a will or a gift of securities, legacy giving is a powerful way to advance the future of healthcare.

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Let's start planning your legacy together.



“ The measure of our success is reflected in the “seed” we put back into our community. ”

The late Robert Huff, farmer and University Hospital Foundation donor