

**LEGACY GIVING THUNDER BAY
SPEAKER SERIES**

**UNDERSTANDING PRINCIPAL
RESIDENCES AND YOUR ESTATE**

Date: Wednesday, October 18, 2017
Time: 7:00 PM
Location: Victoria Inn - Carlton Room

David Facca, CPA, CA



David Facca is a Chartered Professional Accountant and Chartered Accountant with BDO. David, a partner with 17 years' experience in public accounting, provides accounting, audit, and consulting services to a wide variety of clients.

Jason Williams, CPA, CA, CTA



Jason joined BDO in 1997 and qualified as a CA in 1999. From 2000 until early 2012 Jason worked as a senior international tax director with BDO in the UK, where he also qualified as a Chartered Tax Advisor.

This is a free seminar and anyone interested in attending is encouraged to RSPV to Lindsey Wychopen at 684-7106 or by email at wychopel@tbh.net

**LEGACY GIVING THUNDER BAY
SPEAKER SERIES**

**PLANNED GIVING
IN WAYS YOU NEVER THOUGHT POSSIBLE**

Date: Wednesday, September 27, 2017
Time: 5:30 PM to 7:30 PM
Location: Sleeping Giant Brewery

ESTATE TAX PLANNING

Date: Wednesday, November 1, 2017
Time: 5:30 PM to 7:30 PM
Location: Sleeping Giant Brewery

Lawrence Siddall, Executive and Senior Consultant, Investors Group



With over 30 years of professional financial experience it is no wonder that Lawrence Siddall is one of the country's top Executive and Senior Financial Consultants. His knowledge of markets, understanding of client goals, genuine caring for his clients and attention to detail is what makes Lawrence stand out from the crowd.

Please call to confirm your attendance as seating is limited.
807 345 6363 ext 231 or text 807 229 6344

50+ LIFESTYLE EXPO

Congratulations to the winner of the Legacy Giving Thunder Bay 50+ Expo's draw for a free Will kit from Cheadles LLP. Congratulations to Marlene Gillies. Having a Will is a key component in leaving your legacy!



Terri Hrkac presents Marlene Gillies with a Will kit provided by Cheadles LLP at the 50+ Lifestyle Expo.

Your Will is a Gift

A way to be remembered by your community

NEWS FROM LEGACY GIVING THUNDER BAY | FALL 2017



THROUGH LEGACY GIVING MONA BELL'S SPIRIT LIVES ON

Many people wonder who a typical Legacy Gift comes from and what inspires them to give to their community. So many of these wonderful investments in Thunder Bay's charities comes from individuals and families who have worked hard to build a good life. When it comes time to write their Will they think about giving back and how they can continue to build their community in perpetuity ensuring their passion for Thunder Bay is reflected in their Legacy.

Here is a story of Mona Constance Bell.

With her husband Ken she lived a full and caring life. She spent her last days living in Chartwell in an apartment close to her best friend Vi Thomson. When she left us at 95 she made sure her community was left a remarkable and lasting legacy.

Mona was a very private person. Her family had no idea of her philanthropy until she died. She had made substantial annual contributions to both St. Joseph's Care Group and the Thunder Bay Regional Health Sciences Centre while she was alive and they were both beneficiaries in her Will. She also left bequests to 14 additional local charities, which will benefit the community in many ways: Faye Peterson House, Salvation Army, Thunder Bay Symphony Orchestra, St. John's Anglican Church, to name a few.

Mona Constance Bell - February 12, 1920 – January 2, 2016

Mona was born in Port Arthur, grew up in Current River and attended local schools. Her mother, Rosamond, died when she was only seven and her father remarried. Mona had a career in the public service after high school and after World War II met Kenneth Bell. She recounted many times, the story of her first date with Kenny. She had gone to visit a friend in the hospital and Ken arrived with her friend's brother. He asked her to go for a drink with them after their visit. She didn't know what to order because she didn't drink. She ordered a glass of milk and was extremely embarrassed when it arrived. She laughed every time she told that story.

Mona and Ken first lived on McKibbin Street in Port Arthur and spent their summers at their camp at Loon Lake. Ken worked for the Grain Commission and when he retired in 1976, they spent their winters in Mesa, Arizona. They also began to travel. They travelled to Hong Kong to Grenadier reunions, to Europe, Scotland, Australia and went on several cruises.

In the 1990's, Ken developed Parkinson's disease and things slowed down for them. Mona was extremely practical. Mona took care of Ken until his death in 2001 and then she learned to live independently. She lived almost to the end on her own terms. Her bridge games and close friends kept her going. Her church was also very important to her. She was baptised and married in St. John's Anglican Church and that is where her funeral was held. Her goal was to stay on her own in her condo until the end and she almost made it.

You can't talk about Mona without talking about her character. She had a strong will and a forceful personality. She knew what she liked and what she didn't like and she wasn't afraid to tell you. She became part of the Bell family folklore. It was a family joke that when you asked Ken how he was doing, Mona would say: "He's fine". She was also very frugal. And, she fired her doctor last year. She said: "I'm 95. What's the point?"

Mona had a gruff exterior but underneath was a caring person. She was engaged in life to the very end. She lived a long life and a good life.



Pictured: Mona Bell with husband Ken.

KEG GIFT CERTIFICATE DRAW



LIKE us on Facebook between now and October 31, 2017 for your chance to win a \$100 gift certificate at the keg.

fb.me/legacygivingtbay



legacygivingthunderbay.com

COMMUNITY PARTNERS: Confederation College / Northern Ontario School of Medicine / St. Joseph's Foundation / Thunder Bay Community Foundation / Thunder Bay Regional Health Sciences Foundation



PICTURES FROM OUR PARTNER ORGANIZATIONS



Bekkie, Nichole and Jonathon are just a few of the over 1500 success stories behind Confederation College's 2017 graduating class.



Confederation College awarded 44 grade 11 students with conditional offers of acceptance through its unique Confederation Bound: Early Acceptance program.



In 2017, with the support of our donors, Confederation College delivered over \$250,000 in student bursaries and awards.



NOSM graduates Dr. Amanda Richer (left) and Dr. Robin Duffus (right), Dr. Alex Petiquan (centre)



Physicians like Dr. James Goertzen, are integral to the education of NOSM learners like family medicine resident Dr. Kayla Berst.



NOSM medical students (from left to right) Moira Haggarty, Warren Stevenson, and Alana Rawana are pursuing their dream of becoming physicians.



HSC Release -- the HSC Employee Team Toronto make a donation to St. Joseph's Foundation



Lions Club -- Lions Club of Thunder Bay make a donation to Diabetes Health at St. Joseph's Care Group



Kinettes -- Thunder Bay Kinettes make a donation to St. Joseph's Foundation



2017 Scholarship and Bursary Marking Committee with the 2017 Scholarships and Bursary recipients, our community's legacy.



2017 Alumni and Friends Reception including founding board members from 1971 coming together to celebrate the achievements of the TBCF, their legacy.



Donor and Alumni Sue Simonsen with recipient Kaitlin Kotala who received the first ever Susan Cochran Simonsen Bursary for Aboriginal Students.



Recipients of the Dr. Douglas Rathbone Scholarship given to Laboratory Staff at the Health Sciences Centre for continuing education.



Linda Strey's daughters putting up an exam room plaque in honour of their mother.



Mona Bell's family putting up a plaque on an exam room at the Health Sciences Centre.

STORIES FROM OUR PARTNER ORGANIZATIONS

CONFEDERATION COLLEGE

HELP CHANGE LIVES THROUGH LEARNING

Donating to Confederation College helps individuals realize their dreams. Leaving a gift in your Will is a generous and lasting way to help ensure that your desire to make a difference in the lives of others continues into the future. When you establish an endowed award you are providing perpetual support for students, who in turn will impact countless lives throughout their careers. An endowed award can be named in memory of yourself or a loved one, and you can specify criteria around your preferred area of interest, ensuring fulfilment of your philanthropic interests.

Your gift enables Confederation College to provide excellent, accessible education. A gift in your Will is easy to do and doesn't cost you anything during your lifetime. After you have remembered your loved ones, consider bestowing a gift to Confederation College.



NORTHERN ONTARIO SCHOOL OF MEDICINE



NOSM WELCOMES THE ENTERING CLASS OF 2017

Orientation Week (O-Week) gets under way on September 5, 2017 for the Northern Ontario School of Medicine's (NOSM) newest class of medical students. This year's class of 64 students were selected from 2089 applicants—92% of the students are from Northern Ontario; 8% are from other remote and rural parts of Canada; 11% have self-identified as Indigenous; and, 22% are Francophone. O-Week provides an opportunity to learn about the School's curriculum model and social accountability mandate. Students will explore Indigenous and Francophone health, culture, and tradition. Students will also participate in an Oath ceremony, and will recite the Hippocratic Oath. The meaning and importance of the oath will guide them through their 4 years of medical education as well as guiding them through their obligations as a physician after graduation. We welcome the NOSM Class of 2017, the 12th class to begin their medical education journey.

ST. JOSEPH'S FOUNDATION

IN TRIBUTE TO THOSE WE LOVE

Using modern technology, enhanced by beautiful art, St. Joseph's Foundation (SJF) has installed a donor recognition system that will not only pay tribute to passed loved ones, but will do so in a way that provides deeper connection for those who take the time to view it. The technology is a means to tell a human story, the art is a means to reflect the human connection.

This project was funded, in part, by the generous support of Tbaytel. The contribution by Tbaytel funded the equipment purchase and art installation. The digital recognition system is also accessible through the Internet, and a link is available on the St. Joseph's Foundation website (www.sjfb.net/in-memory). This added feature allows the records to be shared around the world.



THUNDER BAY COMMUNITY FOUNDATION



THANK YOU DR. MORRISON

It is with sadness in our hearts we announce the passing of a long time supporter, donor and alumni of the Thunder Bay Community Foundation.

Dr. George Morrison was on the Board of Trustees of the Thunder Bay Community Foundation from 2000 to 2006. After his tenure on the Board of Trustees, he and his wife Mary went on to create the Dr. George and Mary Morrison Family Fund for the Environment. Dr. Morrison touched the lives of many having served in many leadership roles during his medical career including Chief of Staff, McKellar General Hospital, Chief of Staff, St. Josephs Care Group, and the first Chief of Staff, Thunder Bay Regional Hospital.

Dr. Morrison and his family are a wonderful example of how you can continue your legacy in the community.

THUNDER BAY REGIONAL HEALTH SCIENCES FOUNDATION

WHAT WILL YOUR LEGACY BE?

For Steve Jobs, it was Apple. For Shakespeare, it was Hamlet. For Banting and Best, it was the discovery of insulin. We're not all famous playwrights or life-saving scientists. But we can all leave a lasting legacy – even after we're gone. Legacy gifts – donations left in your Will – are often a larger gift than you could give in your lifetime and they can help bring new life-saving ideas and healthcare breakthroughs to life. A legacy gift can simply be a percentage or your estate or a fixed amount in your Will. What if your legacy could sponsor cardiac research, contribute to new cancer treatments, or purchase a baby heart-rate monitor?

Terri Hrkac, Senior Director, Major and Legacy Giving said that "At its heart, philanthropy is about giving back to your community. Leaving a gift in your Will is simply one way to do that". She also adds, "Legacy Giving – is to literally leave a legacy - it is an opportunity to help your family, friends, and community when you're gone."



legacygivingthunderbay.com

COMMUNITY PARTNERS: Confederation College / Northern Ontario School of Medicine / St. Joseph's Foundation / Thunder Bay Community Foundation / Thunder Bay Regional Health Sciences Foundation

Make your Will

For more information about Legacy Giving, and to connect with one of the organization's representatives, visit our website: legacygivingthunderbay.com

<p>CREATE A LIST OF ALL PROPERTY, ASSETS AND VALUABLES</p> <ul style="list-style-type: none"> • Including bank accounts and investments 	<p>SPEAK TO FAMILY AND FRIENDS ABOUT YOUR DECISIONS</p> <ul style="list-style-type: none"> • Who will be Executor • Who will be Power of Care 	<p>SPEAK TO YOUR FINANCIAL ADVISOR</p> <ul style="list-style-type: none"> • Discuss any tax concerns or estate transfer fees (ie. family cottage) and ways to offset taxes
<p>DETERMINE WHO WILL BE BENEFICIARIES OF YOUR ESTATE</p> <ul style="list-style-type: none"> • Family • Friends/loved ones • Charities 	<p>WHO WILL BE POWER OF ATTORNEY</p> <ul style="list-style-type: none"> • Who will be Power of Attorney • Who will take care of minor children 	<p>VISIT YOUR LAWYER TO MAKE YOUR WILL</p>