

ESTATE PLANING SEMINAR

Those wishing to ensure the well being of their family and loved ones, while making a lasting impact on their community, are often confused as to the correct way to proceed. For many the concept of Planned Giving and Estate Gifts seems complicated, technical and difficult to understand.

This, however, isn't true. With some information, direction and support anyone can create an Estate Plan that addresses the needs of their loved ones and family in addition to helping them make a significant gift to charity, and thereby a lasting impact on their community, through a donation in their Will.

For those interested in learning more about these opportunities can attend the ***Estate Planning Seminar presented by Investors Group and BDO, Monday September 29th at the Victoria Inn.***

This informative, and entertaining session will empower you with the tools and knowledge to proceed with your Estate Plans that will fulfill all your needs.

This seminar is free of charge, and offered in 2 separate sessions for your convenience.

Anyone interested in attending is encouraged to **RSVP** to Lindsey Wychopen at **684-7106** or by email at **wychopel@tbh.net**



Estate Planning Seminar

Presented by **Investors Group** & **BDO**

September 29th 2014

Victoria Inn Hotel & Convention Centre | 2 PM Afternoon Seminar
7 PM Evening Seminar

Presenters:



Dave Ablett,
Investors Group



David Facca,
BDO Canada LLP



Michael Ballantyne,
Atwood Labine
Arnone McCartney LLP

Please come and join us for this **FREE** informative session about the benefits of leaving a legacy gift for your family and community.

Hosted by: Confederation College,
Northern Ontario School of Medicine,
St. Joseph's Foundation,
Thunder Bay Community Foundation
& Thunder Bay Regional Health Sciences Foundation

RSVP to Lindsey Wychopen at (807) 684-7106 or wychopel@tbh.net



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



Your Will is a Gift

A way to be remembered by your community

News From Legacy Giving Thunder Bay | Fall 2014

INSPIRATION LEADS TO AMAZING GIFTS

When someone decides to leave a gift to charity in their Will, there are a multitude of reasons why; each as individual as the person who leaves the gift.

Whether its to ensure that in the future others will receive the services they have received; or they want to ensure that others have the opportunities they have had; or whether its to invest in research and planning to ensure others don't have the difficulties they have faced, each decision started with some inspiration.

The inspiration is very personal, and a result of experiences that has either happened to them directly or to a loved one. This inspiration is translated into a gift when they realize what they can do to affect others in their community, now and in the future.

What is your inspiration? What will be your Legacy?

"Mom made the decision to give to the Northern Cardiac Fund on her own," he said. "She was always a spirited and independent woman and this was something that meant a lot to her. Many of her siblings also passed away from heart disease. She wanted her gift to go to an organization where it would be used effectively to save lives."

Anne Pelto's son Glenn.



Margaret and Arnold Westlake loved Thunder Bay. When they moved they gave Thunder Bay Community Foundation a legacy for the arts. Their gift continues to support unique and innovative programs that benefit our community and future generations.

"When you lose a loved one you tend to have feelings of hopelessness and powerlessness and that happened when we lost my husband's mother in 2002 from pancreatic cancer. We wanted to include a gift in our will to the Northern Ontario School of Medicine to aid in pancreatic cancer research and to honour the legacy of Reg and Olga Ironside."

Dawn and Ken Ironside





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.

"I can't tell you how much your gift will help me along the way... not only will receiving this award help me, but my daughter as well... I will finish my studies, find a great job and at the same time be able to give my daughter the life she deserves. Thank You!"

- 2014 award recipient -



Financial Aid

A medical education is both intensive and expensive. Each year, over 80% of our learners apply for financial aid.

Medical students are so fortunate to have thoughtful, caring individuals who recognized the need and have generously supported them. Our learners are very grateful to everyone who has helped to ease their financial stress, and in so doing, supported them on their way to their medical degree.

NOSM donors are proud of their part in this accomplishment. Many have said they would like to continue to support us, including making a significant donation to NOSM by means of a bequest.

Thank you to all who have included the **Northern Ontario School of Medicine** in your Will or to those who are considering it. You will be making positive, long-term impact on the health of the people and communities of Northern Ontario.

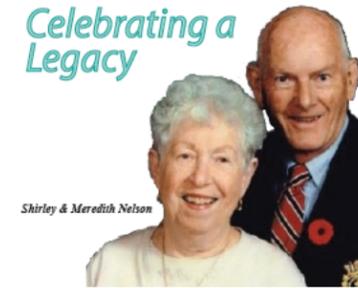


St. Joseph's Care Group (SJCG) is guided by the principles of *Care, Compassion and Commitment*. **St. Joseph's Foundation (SJF)** donors embrace those values and give to continue the works of SJCG, now and in the future.

Many of our donors recognize that while their annual support is essential, so too must they consider the future needs of the organization. They recognize that what they value today, should be there tomorrow for generations to come.

The variety of services offered at SJCG, means a variety of needs to be met. Whether its beds for long-term care clients, specialized equipment for rehabilitative care or treatment tools for those in a chronic disease management program, SJF is there to ensure that those needs are met.

To that end SJF established an Endowment Fund, intended to provide fiscal stability for the future needs of SJCG serving Thunder Bay and our Region. Donors who wish to support the long-term growth of SJCG can leave a gift in their Will which will be directed to the Endowment Fund and held in perpetuity.



Since 1971 the **Thunder Bay Community Foundation** has provided individuals, families and organizations with an opportunity to create Named Funds to support their community passion and provide for causes that matter the most to them. We will work with you to ensure your charitable goals last forever. You can identify and recommend specific charitable organizations to benefit from the fund or allow charities to apply for a grant and have our Grants Committee make the selection for you.

Over the years we have given out over 3.5 million donor dollars to over 300 non-profits to create new programs, support emerging initiatives, augment operating costs and allow for the expansion of existing needed services. Our donors continue to make a significant difference to thousands in our community!

You can create Scholarships and Bursaries so future generations have resources to pursue their education.

"The scholarships awarded possess a certain unity. All are in the names of individuals who through their dedicated altruistic intentions and actions saw the value of investing in youth for community enrichment. The honor of being a part of the legacy of these donors is a source of inspiration and motivation".

- Beatrice Kaiser 2014 recipient of the Ross Wilson Scholarship -



Grace Fox, Dona Ree, Vivian Siciliano ,
Nurse Practitioners TBRHSC

Daydream-Inspired Endowment Fund

Ever daydreamed about what you would do if you won a million dollars? This was what Dona Ree was doing when she came up with the idea to set up an educational fund for Nurse Practitioners (NPs) at **Thunder Bay Regional Health Sciences Centre (TBRHSC)**.

In her million dollar daydream, Ree, a Nurse Practitioner with the Internal Medicine Clinics at TBRHSC, would have built a Nurse Practitioner School in Thunder Bay. In reality, she designated funds in her Will to set up the "Dona J. Ree Endowment Fund" with the Health Sciences Foundation to provide professional development funding for Nurse Practitioners employed at TBRHSC.

This will be Ree's legacy – helping other Nurse Practitioners reach their goals, continually learning and bringing this back to their practice. "I know the struggle of trying to find funds at TBRHSC to attend conferences and expand my knowledge and skills," says Ree.

Ree is a strong believer in giving back to her community because, she says, if we don't look out after one another, no one else will. "Philanthropy begins at home and Thunder Bay Regional is home for me," says Ree. "It has been my home for my entire nursing career starting at McKellar hospital in 1976."

DID YOU KNOW:

- *Approximately 81% of Canadians contribute to charitable organizations throughout their lifetime, but only 7% continue this support through a gift in their Will or estate plan.*
- *Almost 50% of Canadians don't have a Will.*
- *A Legacy Gift can be used to pay tribute or recognition to a loved one.*
- *While there are many giving options, not every charity can, or will, accept every type of gift. It is best to contact the charity to discuss your gift.*

Talk with your family and friends about your Will. It is highly recommended that every donor speak to one or more professional advisors before making a Legacy Gift. Contact the charity to let them know of your gift so that they can demonstrate their appreciation in your lifetime.

