



Fondation
Montfort
Foundation



**BUILDING A HEALTHY
FUTURE TOGETHER:**

**Supporting
Hôpital Montfort
through Planned Giving**



What is a planned gift?

A planned gift allows you to make a meaningful contribution to Montfort, helping us fulfill our mission of providing exemplary person and community-centered care as Ontario's only Francophone academic hospital.

Your generosity supports our strategic goals: serving a growing and aging population, expanding French-language services, strengthening social accountability, enhancing education and research, and fostering innovation to remain a sought-after environment.

Whether your gift addresses the hospital's most urgent needs or aligns with specific services you value, your support ensures Montfort continues to lead in healthcare innovation and remains a vital resource for communities in Ontario for generations to come.

MEANINGFUL WAYS To leave a legacy

Testamentary Bequests

A testamentary bequest allows you to shape the future of Montfort, helping us serve a growing and aging population.

You can designate a specific amount or opt for a **residual bequest**, which allocates the remaining portion of your estate after all debts and specific bequests are settled.

A **contingent bequest** allows you to choose Montfort as the beneficiary if your primary heirs are unable to inherit, ensuring your support for future generations.

This flexibility ensures that your wishes will be fulfilled, while supporting Montfort in its mission.



MEANINGFUL WAYS To leave a legacy

Life Insurance

This approach allows you to give a significant gift without impacting your immediate assets.

Designating Montfort Foundation as the **owner and beneficiary** of a life insurance policy enables you to support our goals of expanding services and enhancing healthcare access for underserved populations. In doing so, you will receive a charitable income tax receipt corresponding to the total amount of premiums paid during the year

Naming the Montfort Foundation as the **beneficiary** of your life insurance policy ensures the death benefit goes to the Foundation upon your passing. For this option, premiums are not tax-deductible, but it reduces the taxes your estate will owe.



MEANINGFUL WAYS To leave a legacy

Endowment Fund

By creating an endowment fund, you ensure that your legacy will support the future of Hôpital Montfort.

The capital is preserved in perpetuity, with the income used to support ongoing efforts to serve an aging population, enhance research as well as educational initiatives, and innovate care delivery.

This fund could be named in your honor or dedicated to a loved one, continuing your support of Montfort's mission for generations to come.



MEANINGFUL WAYS To leave a legacy

Gift of Securities

A gift of securities allows you to contribute through investments in stocks, bonds, or mutual funds, offering significant tax advantages while supporting Montfort's long-term goals.

This is an ideal option for those wishing to avoid capital gains taxes, while making a substantial impact on our ability to expand services, enhance social accountability, and innovate in education and research.

This gift supports Montfort's ongoing efforts to remain a leader in healthcare.



SUGGESTED Wording

A bequest is a simple yet powerful way to support Montfort while reducing your estate's tax burden. You can specify a fixed amount or a percentage of the residue of your estate. Please ensure the legal information below is included to make updates to your will.

"I give to the Montfort Foundation, charitable number 11892 1642 RR0001, the sum of \$ [amount]."

Alternatively, you can designate a residual gift to be allocated as a percentage of the remaining portion of your estate.

"I give to the Montfort Foundation, charitable number 11892 1642 RR0001, [percentage]% of the residue of my estate."

Have you already arranged a bequest to support Montfort?

Thank you for your heartfelt generosity, ensuring that Montfort continues to innovate and remain a sought-after environment for high-quality care and education.

While it's not necessary to inform us, we would love for your gift to be aligned with Montfort's strategic goals and priorities.

Please feel free to contact us at your convenience. Your privacy will always be respected.



Information

Legal Name: Montfort Hospital Foundation

Address: 713 Montréal Road, Ottawa, ON K1K 0T2

Charitable Registration Number: 11892 1642 RR0001

To learn more, please contact:

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