



Heart
&Stroke™

A lifesaving gift, a legacy of hope

**Create your legacy today at Heart & Stroke and
build a healthier future for generations to come**

I Love You



Create your legacy at Heart & Stroke

Heart disease and stroke are a leading cause of death in Canada, **claiming a life every 7 minutes**. As long as lives are lost, there will always be a need for research, innovation, awareness and education – **but this cannot happen without you**.

A gift in your Will to Heart & Stroke will create a lifeline to a healthier future for all people across Canada. You can support the next medical breakthrough and create a future where **life is uninterrupted by heart disease and stroke**.

A photograph of Ken Scott, an elderly man wearing a brown jacket, a hat, and sunglasses, standing on a paved path next to a stone wall overlooking a body of water. He is holding a framed plaque. A large brown dog is sitting on the path next to him.

Ken Scott
Leaving a legacy gift
to Heart & Stroke

Creating a legacy is within anyone's reach

A gift in your Will, no matter the size, will create a lasting legacy of hope for people in Canada – just ask Ken Scott.

When you meet Saanich, British Columbia resident Ken Scott for the first time, you can't help but notice his welcoming smile, gentle demeanor and his commitment to living an active lifestyle. At age 77, Ken is the epitome of someone who takes living a heart healthy lifestyle seriously – and he has a good reason.

When Ken's father, Ralph, was 70 years old, he had a heart attack. Thankfully, Ralph had a full recovery and lived to the incredible age of 97. Ralph's heart attack inspired Ken's mom, Dorothy, to become a Heart & Stroke canvasser to help fundraise in support of critical heart health research. Over the nine years Dorothy canvassed, Ken drove her on her canvassing rounds through central Saanich. Sadly, in 2016, Dorothy passed away at 92.

Today, Ken proudly displays the plaque that Dorothy received in 1999 for outstanding service. With a family history of heart disease and his mother's dedicated fundraising efforts, Ken understands how important it is to live a heart-healthy lifestyle and to help make a difference in the lives of other people affected by heart disease by raising awareness and funds.

In this spirit of giving, Ken created his own legacy with a gift in his Will dedicated to Heart & Stroke. "When you are charitable, you help make the world a better place for everyone," says Ken.

Every legacy gift can save lives

Your legacy can **help us fund the research and innovation** needed to bring tomorrow's most important medical breakthroughs from the research lab directly to the recovery room for patients like Olivier.

Olivier Lanthier had his first cardiac arrest in 2019. He was 14 years old.

Unfortunately, Olivier was not new to heart disease. Diagnosed with heart failure at birth, he needed three open-heart surgeries before he was five.

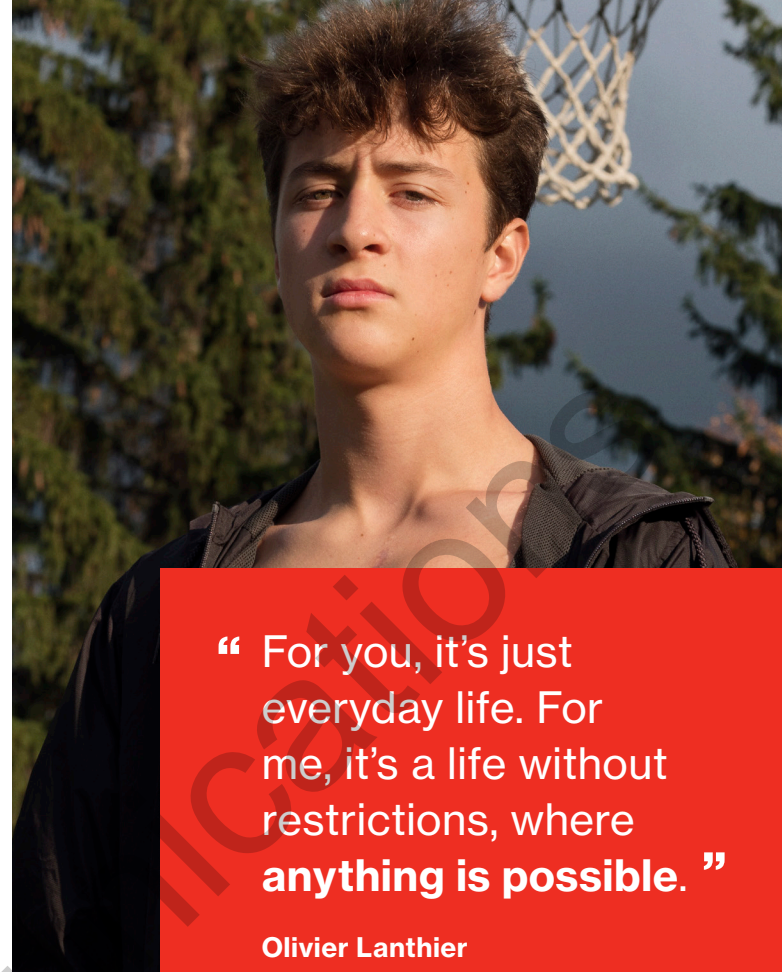
"As a child, I thought that my scar proved that I was a superhero," says Olivier. "My parents always told me that I could try anything I wanted as long as there was no contact. So I played a bunch of sports, like hockey and baseball, but I had much less endurance and I was out of breath very quickly."

Olivier also had to deal with Wolff-Parkinson-White syndrome, an electrical problem between the chambers of his heart that led to episodes of tachycardia or speeding heart rate. "My heart could sometimes reach 260 beats per minute. I had to get shocks at the hospital to bring my heart rate back to normal."

At age 12, the tachycardia stopped so Olivier thought everything was fine. The respite ended abruptly one day at school, when he started feeling unwell. "I thought I was going to pass out."

In the following hours, Olivier had two more cardiac arrests. His heart was very unstable, so he had emergency surgery to implant a pacemaker. Heart & Stroke researcher Dr. Jacqueline Joza is pioneering a pacemaker innovation that could prevent heart failure in the future.

Two months after the operation, Olivier was still in the hospital. Despite the pacemaker, his heart



“ For you, it’s just everyday life. For me, it’s a life without restrictions, where anything is possible. ”

Olivier Lanthier

A heart transplant saved his life

continued to deteriorate. He needed a heart transplant. On the last possible day before he would have needed a mechanical heart, Olivier got the news that there was a heart for him. "It's impossible to put into words the emotions I was experiencing. It was the best day of my life!"

Today, Olivier, now 19, says he has a perfect life. His heart has given him new self-confidence. "For you, it's just everyday life. For me, it's a life without restrictions, where anything is possible. I can walk without being out of breath or worrying about fainting. I can even work out."

Looking back on everything he has been through, Olivier says that he wouldn't change anything, even if he could. "My heart problems have given me a different outlook on life. I know that I'm not invincible, but I have to live my life to the fullest.

With his parents by his side and his courageous outlook, Olivier can overcome anything and beat heart disease.

Research is the backbone of any medical breakthrough

Since the 1950s, Heart & Stroke research funding has led to medical advances, including the first successful open-heart surgery, identification of the genetic link to premature heart disease and the discovery that babies can accept the hearts of mismatched donors.

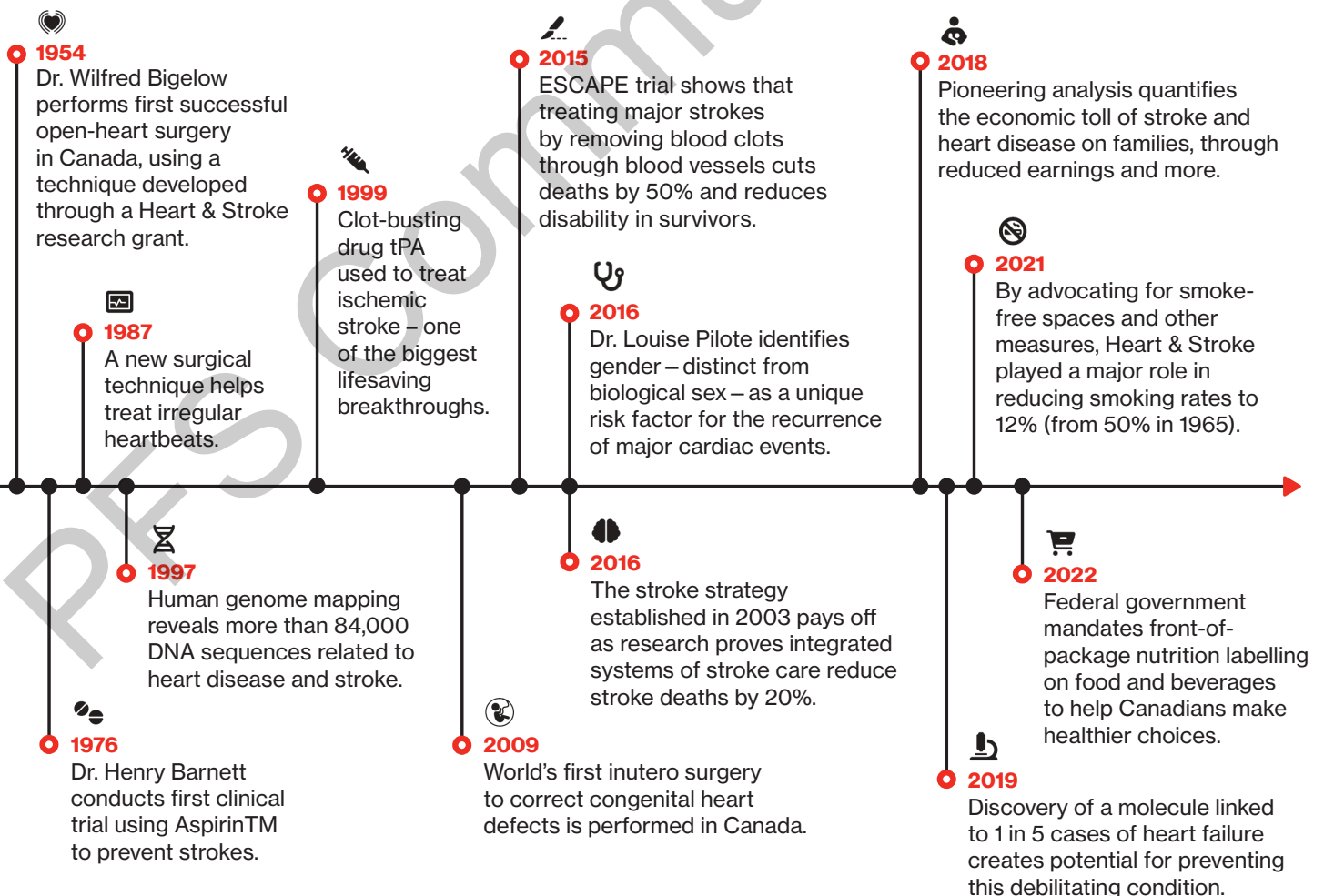
Heart & Stroke researchers are continuing on the path to new advances in many areas, such as improving outcomes for adult heart transplant patients, examining how protein can enhance outcomes in frail patients undergoing cardiac surgery, and the role of flaxseed in reducing the risk of heart failure in women who have taken breast cancer medication.



Over **\$1.7 Billion** invested in breakthrough heart and brain health research since 1952

Breakthrough highlights since 1952

For over 70 years, Heart & Stroke has been dedicated to fighting heart disease and stroke. Our work has saved thousands of lives and improved the lives of millions of others. You'll probably run into someone today who is alive and well thanks to the countless people across Canada who have supported our cause with their time and donations.



Join the fight to **beat** heart disease and stroke.

For more information, visit
heartandstroke.ca/legacygiving



Our legacy promise

Heart & Stroke guarantees that your legacy gift will be honoured according to your wishes. We are committed to responsible stewardship and investing your generous donation in a way that reflects your intention to support the organization's mission. We are dedicated to honouring your commitment to improving heart and brain health for people across Canada.



2300 Yonge St., Suite 1200, Box 2414
Toronto ON M4P 1E4
1-888-473-4636

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A lifesaving gift, a legacy of hope

Legacy giving: Frequently asked questions

We collected answers to the most common questions about **leaving a legacy gift**.

What is a Will?

A Will is a legal document that makes clear your wishes for distributing your assets. It names an executor to administer your estate, and may specify a trustee for managing assets on behalf of the people you name as beneficiaries of money, investments or property.

Can I leave a gift to charity in my Will?

The most popular way to create a legacy gift is through a gift in a Will, otherwise known as a bequest. Your gift – whether large or small – will make a difference, helping to fund vital research, and provide support and care to people in Canada affected by heart disease and stroke.

How do I leave a gift in my Will to Heart & Stroke?

When you choose to leave a gift in your Will to Heart & Stroke, you have the option to give either a specific amount of money or a percentage of your estate. Heart & Stroke will only receive your gift after you have passed.

A gift in your Will can take many forms and consists of cash savings, real property and/or appreciated investments that have increased in value since purchase (e.g., stocks, bonds and mutual funds).

Are there tax benefits for a gift in Will?

Your estate will receive a tax receipt for the full value of your gift. The resulting tax credits will reduce the taxes you owe on your final tax return while helping increase the remaining value of your estate for your beneficiaries.

Everyone's financial situation is different. When considering a gift in your Will you should speak with a tax professional and financial advisor to help you achieve your objectives.

What other kinds of gifts do you accept?

A gift in Will is the most common type of legacy gift. You can also give through Donor Advised Funds, gifts of life insurance or registered savings plans (RRSP/RRIF/TFSA). Your financial advisor and tax professional can help determine what type of charitable gift is best to maximize your tax benefits.

Why should I leave a gift in my Will?

Your gift will have a lasting impact for generations to come. It will help create a sustainable and reliable source of support for lifesaving research, innovation and the latest medical breakthroughs.

Can I change my mind about my gift in Will?

We understand that situations change. When you include a charitable gift in your Will, you have the right to change it at any time.

What information do I give to my lawyer/notary?

Please use the following information to create your legacy gift to Heart & Stroke:

- **Legal Name:** Heart and Stroke Foundation of Canada
- **Mailing Address:** 1200-2300 Yonge Street, Box 2414, Toronto ON M4P 1E4
- **Charitable Registration #:** 10684 6942 RR0001



What are the different bequest options? Are there special ways to write them?

Here are the main types of gifts in Will and suggested language you can provide to your lawyer/notary:

- **Residual bequest/legacy:** You wish to leave a portion or share of your estate to the Heart & Stroke Foundation after all debts and specific bequests to loved ones are paid. For example:

“I give to the Heart and Stroke Foundation of Canada all (or stated percentage) of the rest, residue and remainder of my estate.”

- **Specific bequest/legacy:** You wish to leave a gift for a specific amount to the Heart & Stroke Foundation. For example:

Gift of a specific dollar amount: “I give to the Heart and Stroke Foundation of Canada the sum of (state the dollar amount).”

Gift of a particular asset: “I give to the Heart and Stroke Foundation of Canada (describe the property/asset).”

- **Contingent bequest/legacy:** You wish to leave all or part of your estate to the Heart & Stroke Foundation only if other beneficiaries in your Will pass away before you. For example:

“If (indicate beneficiary name) does not survive me, then I give all the rest, residue, and remainder of my estate to the Heart and Stroke Foundation of Canada.”

Can I leave a gift in my Will and still provide for my loved ones?

Sometimes, people are unsure whether they will have enough to provide for their loved ones while also creating a legacy gift for the future – but it is possible!

We encourage you to talk to your professional advisors regarding your estate plan to ensure you can protect your loved ones while still fulfilling your charitable intentions.

How do I start planning a gift in my Will?

When you're ready to start planning a gift in your Will to Heart & Stroke, we will be here to walk you through the process.

Visit heartandstroke.ca/legacygiving to download a copy of our *Guide to Preparing Your Will* or to set up a conversation with a Senior Legacy Advisor.

Our legacy promise

Heart & Stroke guarantees that your legacy gift will be honoured according to your wishes. We are committed to responsible stewardship and investing your generous donation in a way that reflects your intention to support the organization's mission. We are dedicated to honouring your commitment to improving heart and brain health for people across Canada.



Heart and Stroke Foundation of Canada — Charitable Registration #: 10684 6942 RR0001

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Making a gift in your Will

Frequently asked questions

Your Will can save lives

A gift in your Will, is an enduring testament to the values that you hold dear. When you make a gift in your Will to Heart & Stroke, you share your hope, support and vision of a future free of heart disease and stroke. You make a truly incredible gift benefiting friends, neighbours, loved ones and future generations of Canadians.

Here are answers to some of the most common questions about creating a gift in your Will to Heart & Stroke.

Can I leave a gift in my Will and still provide for my loved ones?

Sometimes, people are unsure whether they will have enough to provide for their loved ones and create a legacy gift for the future. If this is a concern for you, there's a way to make sure your loved ones receive what you intend and fulfill your charitable wishes.

A residual gift can be made from what is left of your estate after all debts and specific gifts to loved ones have been paid, and it may be the best option for you. You receive a charitable tax receipt for the full amount of your gift which may be beneficial to your loved ones when applied to the tax filings of your estate.

Some choose to give all the residue of their estate to the cause they care about. Others imagine Heart & Stroke as an additional loved one and divide the remainder between the people and charities they wish to support.

Whatever you choose, your gift will make a lasting impact for generations to come.

Do you have suggested language I can give my lawyer/notary?

Residual bequest/legacy: You wish to leave a portion or share of your estate to the Heart and Stroke Foundation after all debts and specific bequests to loved ones are paid. For example:

“I give to the Heart and Stroke Foundation of Canada all (or stated percentage) of the rest, residue and remainder of my estate.”

Specific bequest/legacy: You wish to leave a gift for a specific amount to the Heart and Stroke Foundation. For example:

Gift of a specific dollar amount: “I give to the Heart and Stroke Foundation of Canada the sum of (state the dollar amount).”

Gift of a particular asset: “I give to the Heart and Stroke Foundation of Canada (describe the property/asset).”

Contingent bequest/legacy: You wish to leave all or part of your estate to the Heart and Stroke Foundation only if other beneficiaries in your Will pass away before you. For example:

“If (indicate beneficiary name) does not survive me, then I give all the rest, residue, and remainder of my estate to the Heart and Stroke Foundation of Canada.”

What information do I give to my lawyer/notary?

Our full legal name, address and charitable registration number is:

- **Legal Name:** Heart and Stroke Foundation of Canada 1200-2300 Yonge Street, Box 2414, Toronto ON M4P 1E4
- **Charitable Registration #:** 10684 6942 RR0001

Why share your decision to give to Heart & Stroke?

We are grateful for your generosity and commitment to Heart & Stroke’s mission and we would like the opportunity to thank you during your lifetime. We also understand that this is a personal decision and value your privacy. We will not share your personal information.

Do you have any tools to help me plan?

We have created a Guide to Preparing Your Will, which will help you think about your estate, prepare information and make decisions that bring you peace of mind.

Download our Guide to Preparing Your Will at heartandstroke.ca/legacygiving.

Do you have any other questions?

Our team will be here to answer any questions. You can reach us by phone at 1-800-205-4438 or email at plannedgiving@heartandstroke.ca

Thank you for considering a legacy gift to Heart & Stroke.
heartandstroke.ca/legacygiving



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A lifesaving gift, a legacy of hope

Making your gift of life insurance

Frequently asked questions

Your life insurance can save lives

Making a gift of life insurance to Heart & Stroke can benefit friends, neighbours, loved ones and future generations of Canadians. It's a legacy gift, a gift of life and the gift of a lifetime, and is an enduring testament to the values that you hold dear. When you give the gift of life insurance, you share your hope, support and vision of lives uninterrupted by heart disease and stroke.

Here are answers to some of the most common questions about creating a gift of life insurance to Heart & Stroke.

What is a gift of life insurance?

You can name Heart & Stroke as the beneficiary of your life insurance policy or transfer the ownership of your policy to Heart & Stroke. When considering a gift of life insurance to Heart & Stroke, you have options. To find the right solution for your own goals and situation, it is important to get advice from your advisor(s). Life insurance is also subject to various national and provincial regulations, so it is in everyone's best interest to ensure the type of gift of life insurance you are considering is one that Heart & Stroke can receive.

How do you know if a gift of life insurance to Heart & Stroke might be right for you?

Everyone's financial situation is different. When considering a gift of life insurance, you should speak with a tax professional and financial advisor to help you achieve your objectives.

Why share your decision to give to Heart & Stroke?

We are grateful for your generosity and commitment to Heart & Stroke's mission and we would like the opportunity to thank you during your lifetime. We also understand that this is a personal decision and value your privacy. We will not share your personal information.

Do you have the correct information for your insurance provider?

Our full legal name, address and charitable registration number is:

- **Legal Name:** Heart and Stroke Foundation of Canada 1200-2300 Yonge Street, Box 2414, Toronto ON M4P 1E4
- **Charitable Registration #:** 10684 6942 RR0001

Do you have any other questions?

Our team will be here to answer any questions. You can reach us by phone at 1-800-205-4438 or email at plannedgiving@heartandstroke.ca

Thank you for considering a legacy gift to Heart & Stroke.
heartandstroke.ca/legacygiving



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A lifesaving gift, a legacy of hope

Making your gift of registered investments

Frequently asked questions

A gift of registered investments can save lives

Your gift can benefit friends, neighbours, loved ones and future generations of Canadians. You'll be creating a legacy gift, an enduring testament to the values that you hold dear. With a legacy gift to Heart & Stroke, you share your hope, support and vision of lives uninterrupted by heart disease and stroke.

Here are answers to some of the most common questions about creating a gift of registered investments to Heart & Stroke.

What is a Registered Investment?

A registered investment refers to types of investments or investment accounts that are registered with a regulatory authority such as the Canada Revenue Agency.

In Canada, registered investment accounts include Registered Retirement Savings Plans (RRSPs) and Registered Retirement Income Funds (RRIFs). These accounts typically offer tax advantages that encourage Canadians to save and invest.

What types of registered investments can be donated?

Registered Retirement Savings Plan (RRSP): A Registered Retirement Savings Plan (RRSP) is a savings and investment account registered with the Government of Canada. It is designed to help and encourage individuals to save for retirement. The plan's assets grow on a tax-deferred basis and contributions to an RRSP are tax-deductible.

Registered Retirement Income Fund (RRIF): A retirement account registered with the Government of Canada that is designed to provide retirees with an income stream from their savings. Individuals who have RRSPs are required to convert their savings into an income option when they reach 71, and RRIFs are one of the most popular choices. Investment earnings in a RRIF are not taxable, however withdrawals are considered taxable income.

Registered Education Savings Plan (RESP): An RESP is a savings and investment account which is registered with the Government of Canada. It is designed to help families save for their children's post-secondary education. The investments in an RESP grow tax-free until the funds are withdrawn to pay for education costs.

How do you know if this type of gift is right for you?

Everyone's financial situation is different. When considering a gift of registered investments, you should speak with a tax professional and financial advisor to help you achieve your objectives.

Do you have the correct information for your registered savings fund provider?

Our full legal name, address and charitable registration number is:

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- **Charitable Registration #:** 10684 6942 RR0001

Why share your decision to give to Heart & Stroke?

We are grateful for your generosity and commitment to Heart & Stroke's mission and we would like the opportunity to thank you during your lifetime. We also understand that this is a personal decision and value your privacy. We will not share your personal information.

How can you make this kind of gift?

Donating a registered investment to Heart & Stroke is one of the easiest ways to create a legacy gift. Contact the plan administrator or your Financial Advisor and instruct them to name Heart & Stroke as beneficiary of the account.

Do you have any other questions?

Our team will be here to answer any questions. You can reach us by phone at 1-800-205-4438 or email at plannedgiving@heartandstroke.ca

Thank you for considering a legacy gift to Heart & Stroke.
heartandstroke.ca/legacygiving



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Making a gift of securities

A step-by-step guide

Step 1:

Contact the Heart & Stroke Securities Administrator by phone at 403-351-7051 or by email at securities@heartandstroke.ca. We will provide you with the account number and are happy to assist you with making your donation.

Step 2:

Complete all sections of the securities transfer form. Please complete the Donor Information section, including your daytime phone number with area code. Your advisor/broker will help provide the information you need.

Step 3:

Email a copy of the completed transfer form to the Securities Administrator via email at securities@heartandstroke.ca. Securities are transferred into our account without your name. We want to provide you with an accurate tax receipt in a timely manner and provide appropriate recognition to honour your generous gift. It is important for us to receive your name and address details via the completed transfer form.

Step 4:

Email the completed transfer form to your broker or investment advisor. Your broker or investment advisor is responsible for initiating the transfer.

Additional information:

Securities, shares and stocks are considered legally transferred only when our custodial agent RBC Dominion Securities confirms delivery. Your receipt is valued based on the closing price on the day when the shares are legally transferred to Heart & Stroke's account. Heart & Stroke's policy is to sell the shares as soon as possible after they have been received.

For more information, contact:

Securities Administrator
403-351-7051
securities@heartandstroke.ca

Securities Transfer Form

From Donor to Broker

Donor Information (required for tax receipt)

Your receipt is valued based on the closing price on the day when the shares are legally transferred to Heart & Stroke's account.

Name: _____

Address: _____

Phone Home: _____ Email: _____

Work: _____

Cell: _____

Broker Information

Company Name: _____

Contact Name: _____

Phone: _____ Email: _____

Transfer securities from:

Account #: _____

Securities to be donated:

Security Name # of units/Shares CUSIP# / symbol

Security Name # of units/Shares CUSIP# / symbol

I authorize the Heart & Stroke, or its agent, to contact my broker for the purposes of concluding this transaction.

Signature: _____ Date: _____

Transfer securities to:
RBC Dominion Securities
CUID: DOMA
DTC#: 5002
EUROCLEAR#: 90065

Attn: Dave Campeau
Ph: 604-257-7356
Fax: 604-235-9950
david.campeau@rbc.com

Account #: _____
Please contact the Securities
Administrator for the Account #
403-351-7051
securities@heartandstroke.ca

Please email a copy of the completed form before proceeding with your securities transfer to:

securities@heartandstroke.ca

If you have any questions, please contact:

Securities Administrator
403-351-7051
securities@heartandstroke.ca



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