

## What Will Your Planned Giving Legacy Be?

Planned giving is a way to be remembered for your generosity or a way to remember a loved one.

Listing Royal University Hospital Foundation (RUH Foundation) in your will ensures that your legacy of generosity is supporting healthcare priorities for Saskatchewan's patients and families who will need life-saving care and treatment at Royal University Hospital in the future.

### How to Leave a Planned Gift

A charitable will bequest is direction in your will that instructs your Executor(s)/Trustee(s) to leave a portion of your assets to a charitable organization like the RUH Foundation. Below are a few options on how to leave a planned gift:

- A residual gift is the money that's 'left over' in an estate after all the fixed commitments are met.
- A percentage gift is a percentage of your estate and the amount of this gift will ultimately vary depending on the estate size. For example, a donor to RUH Foundation who had 3 children divided her estate into 4 equal portions; each child received their portion of the estate, and the final portion will go to RUH Foundation.
- A fixed sum gift is when you name a specific dollar amount.

If the Foundation is unable to apply all or part of these funds for the specific purpose(s) stated above, then it may be applied by the Foundation as its directors see fit."

We know that considering a gift in your will is an emotional experience. Many people find this a most satisfying way of giving because they recognize that their gift can continue to make a difference.

*Thank you for considering a planned gift through Royal University Hospital Foundation.*

For more information please call Candace Boersma, Royal University Hospital's Annual and Legacy Giving Officer, at 306.655.6501 or [candace.boersma@ruhf.org](mailto:candace.boersma@ruhf.org).



***The material in this document provides general information and is not intended to constitute or replace specific professional advice. Donors considering a legacy gift should speak to an advisor with appropriate tax and other expertise to implement a charitable giving strategy that achieves their objectives.***



## Sample Charitable Bequest Language for Lawyer/Estate Planner Review:

Legal Name:	<b>Royal University Hospital Foundation Inc.</b>
Charitable Registration #:	<b>11927 9131 RR0001</b>

### ***Residual Bequest:***

I direct my trustee to transfer and deliver the residue of my estate, to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the Foundation's general purpose(s) [or, to be applied by the Foundation as its directors see fit].

### ***Percentage Bequest:***

I direct my Trustees to pay or transfer \_\_\_\_\_ (percentage) of my estate to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit].

### ***Fixed Sum Bequest:***

I direct my Trustees to pay or transfer the sum of \$ \_\_\_\_\_ to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit].

For the greatest flexibility in meeting urgent priorities, the <b>Royal University Hospital Foundation</b> <b>prefers bequests to be unrestricted.</b> However, if you wish to restrict /designate your gift, we are happy to discuss that option with you.
---

## **To enable RUH Foundation to use designated bequest funds as intended yet accommodate the unforeseen, please consider the suggested wording below:**

### ***Residual Restricted Bequest:*** (with escape clause)

I direct my trustee to transfer the residue of my estate, including any undistributed income to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the following purpose(s):

If the Foundation is unable to apply all or part of these funds for the specific purpose(s) stated above, then it may be applied by the Foundation as its directors see fit.

### ***Percentage Restricted Bequest:*** (with escape clause)

I direct my Trustees to pay or transfer \_\_\_\_\_ (percentage) of my estate to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the following purpose(s):

If the Foundation is unable to apply all or part of these funds for the specific purpose(s) stated above, then it may be applied by the Foundation as its directors see fit.

### ***Fixed Sum Restricted Bequest:*** (with escape clause)

I direct my Trustees to pay or transfer the sum of \$ \_\_\_\_\_ to the Royal University Hospital Foundation Inc. (the "Foundation") to be used for the following purpose(s):

If the Foundation is unable to apply all or part of these funds for the specific purpose(s) stated above, then it may be applied by the Foundation as its directors see fit.

