

Information for Professional Advisors

Thank you for contacting Victoria Hospice as you support your client in arranging for a future gift to Victoria Hospice. We are pleased to provide the following information:

Legal Name: Victoria Hospice Society

Charitable Registration Number: 11928-4230-RR0001

We offer the following **suggested Will clauses**, as samples, for your review:

UNRESTRICTED GIFT MADE BY WILL:

“To pay or transfer (____% or ____ shares in the residue of my estate or the sum of \$____) to Victoria Hospice Society, currently of 4th Floor, 1952 Bay Street, Victoria, BC, to be used in the area of greatest need as determined by the Board of Directors.”

RESTRICTED GIFT MADE BY WILL:

“To pay or transfer (____% or ____ shares in the residue of my estate or the sum of \$____) to Victoria Hospice Society, currently of 4th Floor, 1952 Bay Street, Victoria, BC, to be used for the benefit of [education activities]. In the event that unforeseen circumstances make the specified use of this bequest no longer practical or desirable, the Board of Directors is hereby authorized to make such changes that are in keeping as far as possible with the spirit and general intent of this bequest.”

ENDOWED FUND:

*“To pay or transfer (____% or ____ shares in the residue of my estate or the sum of \$____) to Victoria Hospice Society, currently of 4th Floor, 1952 Bay Street, Victoria, BC, to establish an endowed fund to be known as the [name of donor] Endowment Fund. The income is to be used in the area of greatest need as determined by the Board of Directors **OR** the income is to be used for the specific purpose of [research activities].*

GIFTING OF APPRECIATED SECURITIES DIRECTLY FROM ESTATE

“I encourage my Trustee at his/her discretion to consider transferring publicly traded securities owned by me at my death and having a fair market value at the date of my death greater than their cost base to me, in satisfaction of any charitable gift, under this my Will, in order to achieve an enhanced tax saving for my estate.”

Thank you again for your role in helping your client plan their future gift to Victoria Hospice. For further information, or should your client wish to make a restricted gift and need specific Will clause language, please contact **Shelley Engelhardt, Development Officer – Planned & Legacy Giving** at: (250) 519-1743 or via email at Shelley.Engelhardt@victoriahospice.org