

Official bequest language to give to your lawyer/estate planner.

Legal Name: Heart and Stroke Foundation of Canada

Charitable Registration #: 10684 6942 RR0001

Residual Bequest

"I direct my Trustees to pay or transfer ____ (number) of such equal shares of the residue of my estate to the Heart and Stroke Foundation of Canada (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit]."

General Legacy

"I direct my Trustees to pay or transfer the sum of \$_____ to the Heart and Stroke Foundation of Canada (the "Foundation") to be used for the Foundation's general purposes [or, to be applied by the Foundation as its directors see fit]."

Discretion to Transfer Shares

"In making any payment to a charitable institution pursuant to the provisions of this Will, my Trustees may transfer any shares held by my estate in any publicly traded company or corporation in lieu of cash, provided that the shares transferred shall have a fair market value on the effective date of the transfer equal to the amount payable to the charitable institution. In exercising their discretion, my Trustees shall take into consideration the tax benefits, if any, which may be enjoyed by my estate by transferring such shares in specie."

Specific Legacy

"I direct my Trustees to pay or transfer the sum of \$_____ of my estate to the Heart and Stroke Foundation of Canada (the "Foundation") and I direct the Foundation to apply such sum towards research. In the event that circumstances make the specific use of this gift no longer practical or desirable, the directors of the Heart and Stroke Foundation are hereby authorized to make changes in its use which remain in agreement with the spirit and general intent of the gift."

Thank you for considering how you can leave a legacy through the Heart and Stroke Foundation.

For more information please call the National Gift Planning Office: 1-800-205-4438 Ext. 2 or contact your provincial **Heart and Stroke Foundation office**.

Note: Bequest administration is managed by the province where the donor resides.

This material 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 strategy that achieves their objectives.