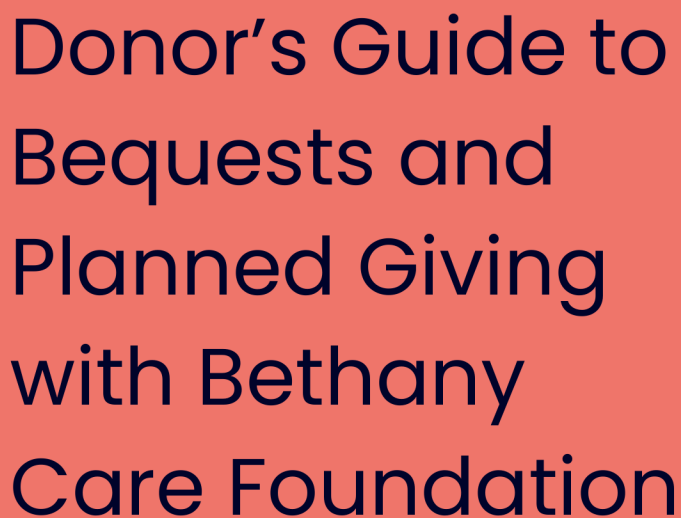


LEAVING YOUR LASTING LEGACY

The text "Donor's Guide to Bequests and Planned Giving with Bethany Care Foundation" is displayed in a dark blue, sans-serif font, arranged in five lines. It is positioned on the left side of the page, partially overlapping a large, solid red circular graphic that occupies the bottom-left corner.

Donor's Guide to
Bequests and
Planned Giving
with Bethany
Care Foundation

THANK YOU FOR YOUR SUPPORT

Embarking on the journey of making a planned gift to the Bethany Care Foundation is truly remarkable! Your commitment to giving goes beyond the present, as you contribute a piece of your legacy to transform the way Albertans age and leave a lasting impact on the care and support of future seniors. Your generosity paves the way for enriching experiences that will enhance their lives—a wonderful legacy for your family and loved ones, and an extraordinary message of support for the community.

On behalf of our residents, their families and our teams of caregivers and volunteers, we sincerely thank you.

This guide is crafted to assist you in planning your gift. We encourage you to reach out if you have any questions before finalizing this generous act. Additionally, we recommend consulting with a professional who understands your unique personal and family situation, such as a financial advisor, lawyer, or accountant.

As you contemplate this significant planned gift, it's essential to note that the designated beneficiary of your generosity is: Bethany Care Foundation.

Your support ensures a legacy that transcends time, making a profound impact on the lives of those who will benefit from your thoughtful contribution.

WHAT IS LEGACY GIVING?

Legacy giving, also known as planned giving or bequest giving, is the act of leaving a charitable gift as part of your will or estate plan to support a nonprofit organization or cause that holds personal significance to you. This form of giving allows you to make a lasting impact on the organizations that you care about, in this case Bethany Care Foundation, extending your support beyond your lifetime.

By making the choice to leave a legacy gift, you transcend the limits of a single lifetime, leaving an indelible mark on the organizations that have touched your heart.

Your legacy gift is a testament to your enduring support for the aging journey of future aging generations.

Legacy gifts provide a stable source of funding that can help Bethany plan for the future and undertake long-term projects.



THE 60 SECOND BEQUEST: *Gift of RRSPs*

Selecting Bethany Care Foundation as one of the beneficiaries of your RRSP(s) is the simplest and quickest method to include us in your legacy giving plan. With just three straightforward steps, you can enjoy multiple benefits.

STEP ONE: Request an RRSP/RRIF Multiple Beneficiary Designation form from your financial institution.

STEP TWO: Complete the form, adding Bethany Care Foundation and any other preferred charities as beneficiaries.

STEP THREE: Return the form to your financial institution.

The advantages of this approach are numerous:

- It's quick
- No legal representation required
- No probate fees
- No associated costs
- Offers flexibility
- Bypasses the last will

GIFT IN YOUR WILL (Charitable Bequest)

Contributions That Don't Affect Today's Bottom Line

Making a gift to the Bethany Care Foundation through your will is a profound way to share your values with your loved ones and the wider community. Often considered the most significant gift one can make, a gift in your will allows you to extend your impact well into the future.

What makes a bequest particularly appealing is its flexibility. You can amend it at any time, providing financial reassurance as you retain full control over your assets throughout your lifetime. This ensures that your decision aligns with your evolving circumstances and priorities.

It's worth noting that **the majority of charitable gifts in Wills are made by individuals of average means**. As you contemplate your legacy, you might be pleasantly surprised to discover that when all of your assets are realized, you will have a tidy sum to support both your loved ones and the Bethany Care Foundation.

Leaving a gift in your estate to the Bethany Care Foundation can be a straightforward process. It may be as simple as adding a carefully crafted clause to your Will. We encourage you to engage your loved ones in this decision-making journey. By involving them, you not only share the joy of giving but also celebrate the essence of who you are, the values you hold, and the life you lead.

Making a gift through your will does not affect your lifestyle today.

By including Bethany Care Foundation in your will, you may also bring tax benefits to your estate.

DID YOU KNOW?

The two most commonly used wills in Alberta are:

FORMAL WILL

This is the most common type of will. Formal Wills must be in writing and include your signature at the end of the document. They also are **required to have two witnesses who have signed the Will in your presence**. These people cannot be beneficiaries and must be someone other than your legal spouse.

HOLOGRAPHIC WILL

A Holographic Will, which is free, is considered a legal document in Alberta and is one in which you write yourself by hand. These informal Wills are not created by a lawyer and do not require a witness. It will be subject to verification after death. There are a few things that they must include to make it a legally binding document, such as:

- Written in your own handwriting. You cannot use a computer or other electronic/mechanical device to write it.
- Must include your signature at the end of the Will. We also suggest dating your Will, though this is not required.
- It must be written in ink, not with a pencil.

It's important to note that while these are the primary types of wills, it is advisable to seek legal advice when creating a will to ensure that it is valid, reflects your intentions accurately, and complies with the specific laws in Alberta. Laws can vary, and legal professionals can provide guidance tailored to your individual circumstances.

GIFT OF LIFE INSURANCE

A life insurance policy can allow you to make a major donation by dispersing only a fraction of the total amount the gift: you pay the annual life insurance premiums and, upon your death, the charitable organization of your choice that has been designated as the beneficiary of the policy, such as Bethany Care Foundation, receives the insured sum. It's a method of planned giving that allows you to leave a lasting impact on Bethany and other charitable organization of your choice by leveraging the financial protection provided by a life insurance policy.



WHY CHOOSE BETHANY

Since 1945, Bethany has celebrated aging and valued choices, quality of life, independence and community. These are the cornerstones of our services. As the senior population grows, so do we, responding to the needs of the communities we are part of.

The role of the Bethany Care Foundation will be more critical than ever as the population of seniors in Alberta is expected to more than double by 2051. **Your legacy gift plays a pivotal role in empowering us to innovate, adapt to shifting healthcare landscapes, and uphold the highest standards of care for current and future generations.**

Inspired by our legacy of faith, caring and love, along with a passion to serve, we create caring communities for our seniors. Our continuing care programs, residences and service options reflect the changing social, physical, spiritual, emotional and intellectual needs of our residents and tenants.

We're investing in research, innovation, and technology to provide exceptional care and quality experiences every day, and to create the positive and uplifting environments that Bethany is known for.

We build on the successes of the past and we are not afraid of stepping outside of what we know to discover the possibilities that are before us to support Albertans to age well. **Choose Bethany for a legacy that transcends time, shaping the future of senior care with compassion and innovation.**

THE IMPACT OF YOUR LEGACY

Your legacy has the power to transform lives and make a lasting impact on the residents of Bethany Care Centres. Here's how your generosity can make a difference:

\$10,000: This contribution would enable us to acquire specialized equipment such as a medical-grade linen warmer or a mobile lift, enhancing the comfort and care of our residents.

\$25,000: With this amount, we could establish a sensory room, providing therapeutic benefits particularly beneficial for residents living with acute dementia.

\$100,000: Your generous donation at this level would play a pivotal role in supporting the future growth of Bethany Care Centres through capital investment.

Each of these legacy gifts would leave an enduring and profound impact, enriching the lives of our residents for years to come.



STEPS TO TAKE: *Legacy giving made simple*

Creating a lasting impact on the future of aging Albertans through a legacy gift is simpler than you may think. By following the steps below, you can contribute to the development of compassionate communities at Bethany, leaving a meaningful and enduring mark.

Consult Professionals: Seek advice from legal and financial professionals to ensure your wishes align with legal requirements and are accurately reflected in your will. We can help you connect with professionals, if that is your wish.

Specify the Gift: Clearly outline the details of your legacy gift in your will, including the amount or percentage of your estate, or the residue after other bequests have been fulfilled, you want to donate to us and name Bethany Care Foundation as the beneficiary.

Review and Update: Regularly review and update your will to account for any changes in your financial situation, family structure, or the charitable organizations you wish to support.

Inform Loved Ones: Communicate your intentions with your loved ones so they are aware of your charitable wishes and can help ensure they are carried out according to your wishes.

TAILORING YOUR LEGACY GIFT WITH MEANING AND PURPOSE

At Bethany, our dedicated team is ready to assist you in tailoring your legacy gift to align with what holds personal significance to you. Our flexible approach is designed to meet your philanthropic goals, ensuring that your contribution makes a meaningful impact.

Whether you prefer to dedicate your gift to a specific Bethany site or channel your support towards our therapy programs, capital projects, innovation portfolio, or areas of greatest need, we are committed to helping you create a lasting legacy that reflects your values and aspirations.

RECOGNITION

We are eager to collaborate with you in exploring personalized forms of recognition that hold meaning for YOU, tailored to the magnitude of your generous gift. Our commitment lies in fostering an open dialogue to highlight and celebrate your support in a way that resonates with your values and objectives. We also deeply respect those who choose to make their legacy gift anonymously.



A WONDERFUL WAY TO SUPPORT BETHANY

Bethany is one of Western Canada's largest not-for-profit providers of care, housing, and community services for seniors and person with disabilities. Since 1945, Bethany has provided high-quality, person-centered care focused on the unique physical, emotional, and spiritual well-being of our residents and tenants.

Our aging population is increasing the demand for housing and continuing care services. Bethany's work is changing to meet this demand and lead in the development of new approaches to care and support of Albertans on their aging journey.

The Bethany Care Foundation carries on the philanthropic tradition that has supported the growth of Bethany for over twenty years. It relies on donor support to provide innovative, meaningful programs and create comfortable home-like spaces for seniors and adults with complex care concerns. The Foundation strives to make a difference every day, for the people who call Bethany home.

THANK YOU

Are you considering including a charitable donation in your will?

Contact our Bethany Care Foundation Team for more information or to discuss your personalized legacy giving plans confidentially.

Phone: 403-210-4600

Toll-Free: 1-888-410-4679

Email: bcf@bethanyseniors.com

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