

Pay it forward today, change a life tomorrow

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Some of my favourite times are visits with senior friends and clients, when I have the opportunity to hear their stories and how they got to where they are today. Sometimes the answer is luck, but more often than not it is hard work, determination, and a great plan that allowed them to achieve success.



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I recently had the pleasure of working with a new friend who had a thousand awesome stories - his life reads almost like a Clancy novel. With his children now successfully established with families of their own, a review of the insurance portfolio was in order.

One policy in particular was purchased as part of an estate plan. The original purpose was no longer valid, and was highlighted for possible cancellation. He wondered what to do.

After visiting with his planner and a representative from the QEII Foundation, he decided to gift his policy to advance care at the QEII Health Sciences Centre.

Here's the neat part. He repurposed a financial product - a life insurance contract - and through that, he will impact patients and families at the QEII, well into the future.

In addition, he received an immediate, sizable tax receipt and will receive ongoing charitable tax receipts for the rest of his life. He has the satisfaction of knowing that in time the proceeds from the policy will help fund the vital work of the QEII, benefiting all Atlantic Canadians. Another epic story to add to his collection!

Think of your investments and insurance contracts as opportunities to do something awesome with your legacy.

You can change a life without knowing a name.

Inspired by the care at the QEII, Barry and Vivien Marvel left a gift in their will to advance care for future patients.

A gift in your will is an easy and affordable way to make a lasting impact. Whether it's a modest sum or a small percentage to suit your family circumstances, the impact will last for generations. For more details or a free copy of our **Estate Planner**, please contact our Gift Planning team: Lori Scott, Katharine Berrington, or Charles O'Neil at **1 888 428 0220**.



Health begins with caring. Here is my gift \$ _____

I would like my gift to remain anonymous

NAME _____

ADDRESS _____ CITY _____ PROV _____ PC _____

PHONE _____ EMAIL _____

CHEQUE VISA MC AMEX #: _____ EXPIRES _____

SIGNATURE _____

I would like to learn more about:

- including the QEII Foundation in my Will
- gifts of securities
- planning my estate
- using my RRIF to arrange a donation
- I have already remembered the QEII Foundation in my Will