

Winnipeg Free Press
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LEAVE A LEGACY™
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MANITOBA CHAPTER
Canadian Association of Gift Planners

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What is Leave A Legacy™?

LEAVE A LEGACY™ is a national, community-based public awareness campaign of CAGP that encourages people to leave a gift through their will or another planned giving vehicle to a charity or cause that is meaningful to them.

LEAVE A LEGACY™ was first established in the United States by the Central Ohio Planners and licensed to the CAGP in Canada. For more than 10 years, the program was generously supported by Great-West Life, London Life and Canada Life as the LEAVE A LEGACY™ Founding National Development Sponsor. Today, the program is delivered through local CAGP Chapters.

Each local LEAVE A LEGACY™ program is distinct in its organization and delivery in order to serve the unique needs of its community while, collectively providing an important public awareness message. Supporters of local LEAVE A LEGACY™ programs include charitable organizations, professional estate and financial organizations, financial institutions, community foundations, other local funders and the media.

Although the program is active throughout the year, May is officially LEAVE A LEGACY™ Month. ■

— Source: cagp-acpdp.org/en/leave-a-legacy

For more information, visit
winnipegfreepress.com/leavealegacy

YOU can change the course of cancer.



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**Help ensure the best care
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At the young age of four Maia was diagnosed with high-risk acute lymphoblastic leukemia.

In addition to the cocktail of chemotherapy drugs she received, young Maia required several rounds of cranial radiation. Research in our province is funded exclusively by donors and it is years of donor-supported research which has laid the groundwork for Maia's treatment.

Your bequest will further promising research and medical breakthroughs. You could fund the next important discovery that will lead to better outcomes for people like Maia, or someone you know and love.

Your bequest can support an area of specific interest to you, such as clinical trials, patient & family services or recruitment and retention of world-class staff. Thank you on behalf of the patients who will benefit from your generosity.

By including a bequest in your will or estate plan, you will help ensure future generations are taken care of.

A bequest is more than a donation. It is about perpetuating your values, beliefs and strong desire to make a difference. A bequest is a celebration of joy, values and life.

A bequest through your will provides you with an opportunity to make a significant impact upon your death. It also provides a deep sense of joy and partnership during your life – knowing your gift will significantly impact critical cancer research and patient care.

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All funds raised stay in Manitoba.

Rena Molinari (left) and Lynda Ruban are co-chairs of the Leave A Legacy committee of the Canadian Association of Gift Planners' Manitoba chapter.

Invest in the future

By Jim Timlick *for the Free Press*

Determining how and with whom to share a charitable gift as part of a will requires plenty of deliberation and planning.



Thankfully, it's a journey you need not embark upon alone, says the co-chair of the Leave A Legacy committee of the Manitoba chapter of the Canadian Association of Gift Planners (CAGP). In fact, Lynda Ruban says enlisting the help of a qualified investment professional can provide a broader perspective and a range of options that best suit a person's wishes.

"A financial advisor's role is to provide people with options and answer some of the tricky questions they might have...and give them an opportunity to think about things," says Ruban, a former planned giving manager for the Canadian Cancer Society.

"The business of planned giving is really about having a conversation. Chances are once a person finds a financial advisor they are comfortable with they might find options or different vehicles for giving that they didn't know were available to them before."

Leave A Legacy co-chair Rena Molinari agrees. She says because a financial advisor knows all the ins and outs of the tax system, they can help devise a plan that allows an individual to maximize their charitable contribution while minimizing the amount of taxes that person or their survivors must pay.

For example, she says, a financial advisor may recommend that rather than selling shares and donating the proceeds to a charity that an individual simply transfer those shares to the charity. The charity can then sell the shares and provide a tax receipt for the amount the shares sold for, meaning the original shareholder can avoid paying capital gains.

"Your financial advisor would be the best person to guide you on a clearer path on what's the best way for you and what vehicles are available to you," says Molinari, past director of development for the

Victoria General Hospital Foundation.

Ruban cautions that tax savings shouldn't be the only factor people should consider when it comes to estate planning. While it's certainly part of the equation, she suggests that people should make sure to choose a charity that aligns with their personal beliefs and values.

"A couple of years ago there were some American statistics that came out that said the reason people were leaving money for charity in their will was tax savings," she says.

"A few years down the road it was shown that it's not really about the tax savings. It's really a commitment to a cause. It's about their charity of choice. Tax savings and tax credits are further down the list."

Molinari and Ruban both say it's important for people to do their homework when it comes to choosing a charity they wish to bequeath a gift to. Ruban says that can include speaking directly to people who work for a charity to better understand the organization's mission, vision and values.

"Working at a non-profit organization and as a fundraiser my position was to help donors navigate the organization and set them up with the right people," Ruban says. "It was about developing long-term relationships. With those donors we would often go from handshakes at the start to hugs eventually. You almost became part of the family."

Family is another important part of the planning process when it comes to making a bequest.

Molinari recommends making children and other family members aware of what your wishes are regarding your estate in the present rather than after your passing.

"It's very important if you have children that they're aware of what your wishes are. Sometimes things can get quite complicated if a child doesn't know that a portion of an estate is going to be going to a charity," she says. "Make sure that everybody close to you is aware of what your wishes are... and that you are leaving a bequest and where it's going."

Leave A Legacy is a national, community-based public awareness campaign sponsored by the CAGP. The campaign was successfully launched in Manitoba in 2000 and aims to encourage people to leave a gift through their will or another planned giving vehicle to a charity or cause that is meaningful to them. Dozens of charities, corporations and foundations from across the province participate in the campaign each year.

"There are a lot of people out there who don't realize you can do something like this," Ruban says. "As members of the Canadian Association of Gift Planners, we value the opportunity to steward

stakeholders to ensure their legacy plan suits their individual needs. The intention behind the campaign is to get the message out that you can invest in the future through your estate plan. Your legacy is what you've achieved in your lifetime both through family and work and once your estate is in order this is the greatest gift for your loved ones." ■

"A financial advisor's role is to provide people with options and answer some of the tricky questions they might have... and give them an opportunity to think about things."

Ways to leave your legacy:

- Bequest
- Cash or securities
- Life insurance
- RRSPs or RRIFs
- Annuities
- Charitable remainder of trusts
- Residual interest
- A gift in memory of a loved one
- Real estate
- A gift to honour someone
- Special occasion giving



The top 10 things you can do today to Leave A Legacy™

1. Prepare a will
 2. Leave a gift
 3. Be specific
 4. Consider assets
 5. Name an alternate beneficiary
 6. Existing life insurance
 7. New life insurance
 8. Memorial gifts
 9. Encourage others
 10. Ask your advisor
- Source: CAGP website

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LEARN ABOUT LEAVING A GIFT IN YOUR WILL TO A CAUSE YOU LOVE



Find out more at a **free information session** hosted by The Winnipeg Foundation where you can gather information, ask questions and hear inspiring stories, with no strings attached. Learn how easy it is to:

- Leave a bequest for a cause close to your heart
- Create a personal or family legacy
- Give as part of your estate plan (there are tax benefits!)

PLEASE JOIN US FOR ONE OF THE FOLLOWING TWO-HOUR SESSIONS:

Location: Winnipeg Foundation offices, 1350 One Lombard Place

Thurs, May 10, 5 to 7 pm

Wed, May 16, 1 to 3 pm

Tues, May 29, 11 am to 1 pm

These are free information sessions only; there is no obligation to establish a bequest at any time.

TO RESERVE YOUR SPOT, PLEASE REGISTER BY CONTACTING:

Jaime Kyle, Legacy Services Coordinator

204.944.9474 EXT 289 or

jkyle@wpgfdn.org

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Is The Winnipeg
Foundation in your Will?
**ASK ABOUT OUR
LEGACY CIRCLE.**



Legacy gift will leave no one behind

You'll never walk alone. It's a song that first appeared in the Broadway musical *Carousel*, that Jerry Lewis sang to close out his annual telethon for more than four decades, and is the anthem of English Premier League soccer's Liverpool Football Club and other sports teams across the globe.

It's a song that unites people. And to Charles Tax, it encapsulates the importance of building community and giving everyone a fair chance.

"We must provide opportunities for disadvantaged and vulnerable individuals to fully participate and excel in the general community," he says. "Our motto must be, 'You'll never walk alone.'"

Mr. Tax's younger sister Susan was born with Williams Syndrome, a rare genetic condition that is characterized by developmental delays and learning challenges, alongside a highly social personality and an affinity for music.

This experience has greatly influenced Mr. Tax's outlook.

"Because of my sister, we've been a beneficiary of the wonderful services available in the community," he says. "The community has done so much for her that we must give back."

The mantra 'You'll never walk alone' took on new meaning for Mr. Tax following a trip to the United Kingdom a few years ago. He took Susan to England to celebrate her 60th birthday, and they toured Anfield Stadium, home of Liverpool FC.

"When you watch a game, in a big game when (Liverpool is) playing an arch-rival like Manchester United or their Liverpool city neighbours Everton, they all sing in unison, the whole stadium," he said.

Anfield Stadium holds more than 54,000 people and the community that is built through song is inspiring.

"We're no better than the weakest links in our community. We must get them involved, so we've got to support them. They have to feel they're part of the community. And we must be inclusive," he said.

As Mr. Tax was thinking about his legacy, he knew he wanted to ensure all young people are given an opportunity to succeed.

"Youth is the city's most important asset; its future," he said. "Young people need good role models, positive experiences and a comforting environment."

He decided to establish a Field of Interest Fund at The Foundation through a gift in his estate plan. His fund will

provide young people from at-risk communities with recreational and cultural opportunities.

The Winnipeg Foundation, Canada's first community foundation, has been helping donors like Mr. Tax leave a mark on our community and achieve their philanthropic goals for almost 100 years. Gifts to The Foundation are endowed, creating a permanent source of support for charities.

There are many ways to create your legacy through The Winnipeg Foundation. You can create a fund in your name, contribute to an existing fund, or support The Foundation's leadership in a variety of areas.



Charles Tax with his sister Susan.

Or you can plan now to give later through a gift in your will, such as a bequest, insurance policy, or retirement assets like RRSPs and TFSAs. These are just a few examples. Foundation staff are happy to meet with you to discuss your purpose and individualized legacy. And you can join us for Bequest 101, an interactive workshop where you can learn how easy it is to leave a bequest in your Will. Look for our ad for details.

When you make a gift in your will to our community through The Winnipeg Foundation, you provide for the causes you hold close to your heart and for generations to come. For Good. Forever.

For more information about creating your legacy, please contact Kathryn Cardwell at 204-944-9474 ext. 258 or kcardwell@wpgfdn.org.

For information about attending Bequest 101, look for our ad or contact Jaime Kyle at 204-944-9474 ext. 289 or jkyle@wpgfdn.org. ■

Helga McPherson's Legacy Gift

On her 75th birthday, Helga McPherson filled the Norwood Hotel dancefloor with friends, family, strangers, and glow sticks. A photo on her mantle immortalizes the night: Tanja, her daughter, has her arm thrown around Helga's shoulders—both smiling wide—with glow stick halos in their hair.

But not every special occasion was this celebratory. Nearing midnight on New Year's Eve, 1999, Helga lay in a hospital bed, recovering from a sudden stroke. Helga says this moment changed her life, igniting a passion for health care.



"If you look around, in every family there's cancer, there's heart attacks. If we help with donations, maybe it doesn't have to get to this point," says Helga.

Already a monthly donor to the HSC Foundation, Helga has now thoughtfully and generously left the Foundation a gift in her Will. Her extraordinary kindness will help improve what HSC can do for patients.

Despite her warmth, great sense of humour, and positive attitude, Helga has not had it easy. After a difficult childhood in Germany during World War II, Helga decided as a teenager to become the kind of person she needed when she was younger. "I'm always looking out for people not so well off. But I always can do more," she says, rubbing her palms against her eyes. "I remember, even as a child, everything I had was always shared."

Helga never had the chance to meet her father, a fallen soldier whose body has yet to be found, but believes her compassion and kindness comes from him. "The way I see myself now was the way other people say they saw him: his gentle nature, his looking out for other people."

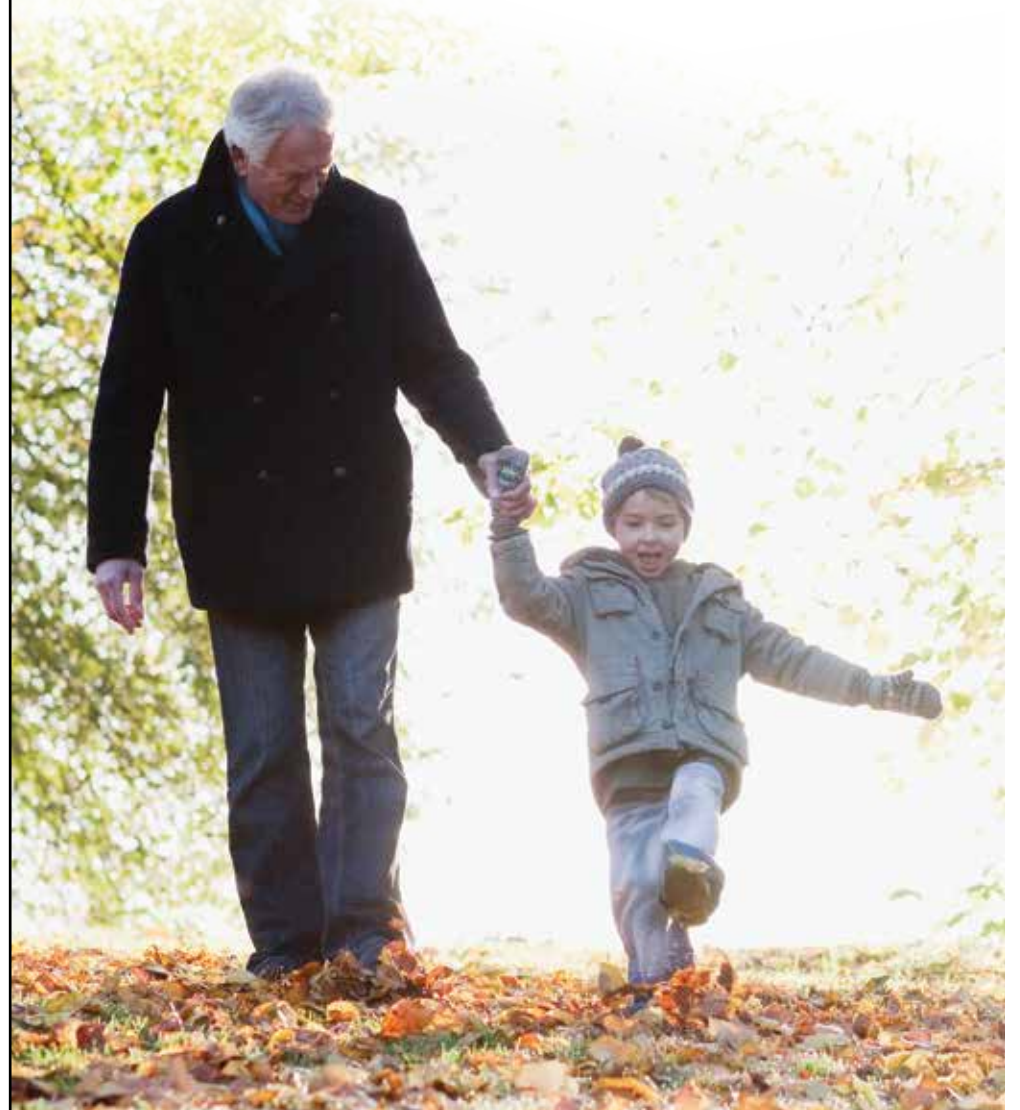
"I'm still here," Helga adds. "Maybe I have a purpose to still do good things."

Your Gift Brings Hope to Life

Make a lasting and meaningful impact on healthcare in Manitoba by leaving a legacy gift in your Will to the Health Sciences Centre Foundation. Your endowed gift ensures that your family and friends can rely on the exceptional quality of care provided at HSC for generations to come. A planned gift or bequest in your Will can **Bring Hope to Life** without reducing your cash flow or savings today.

To name the HSC Foundation in your Will, or inform us if you have already done so, contact Lorri at lpodolski@hscfoundation.mb.ca or 204-515-5624.

www.hscfoundation.mb.ca/legacy



Health Sciences Centre
FOUNDATION



Stephen Webb, chair of the CAGP's Manitoba chapter, encourages people to take the time to openly engage with their financial planner about their philanthropic plans.
Submitted photo

Webb, who is also President and CEO of Entrust Financial Services, a Winnipeg-based financial advisory firm, said many people give, and the primary reason is that they want to give back and make an impact in their communities, particularly with something they're passionate about, while also creating a tax benefit.

Donations up to \$200 in Manitoba, for example, provide a 25.8 per cent tax credit while donations over \$200 generate a 46.4 per cent tax credit.

"You give with your heart but when you use your head you make it smarter. Whenever you have a plan for anything, you'll always have a better result," he said.

The CAGP, which was formed in 1993, brings together charitable fundraisers and professional advisors while advocating for beneficial tax and legislative environments that encourage philanthropic giving.

About five per cent of the CAGP's membership are financial advisors, another five per cent are lawyers, one per cent are accountants and the rest work for charities and foundations.

There's no question mass affluent Canadians are quick to get out their chequebooks. According to CAGP figures, 74 per cent of them have donated between \$1,000 and \$10,000 in the past year. Another five per cent donated between \$10,000 and \$25,000.

The CAGP focuses on the strategic charitable-giving aspect of philanthropy and the planning work that goes on around it.

"Gift planning isn't somebody knocking on your door and you looking for your wallet to fish out \$20.

Your financial plan is a collection of mini-plans for retirement, investment management, tax and your estate. Why is it so strange to have a charitable giving plan? Charitable giving involves gifts of money or assets with tax consequences so they're all integrated," Webb said.

Gift planning represents a double-barrelled approach for both donors and charities. On one hand, it takes traditional fundraising campaigns to the next level by enabling them to raise funds and generate revenue in a much more efficient manner and attract and retain donors while also achieving an unparalleled return on investment.

Donors, meanwhile, are engaged in the process of funding their ultimate philanthropic wishes today and after their death.

Webb wants to encourage both would-be donors and professional advisors to become more involved with the process and each other. Donors should be having discussions with their financial planners, lawyers and accountants to see how they might improve their philanthropic endeavours, and advisors should speak to their clients about the values and causes they cherish the most.

Webb is quick to note, he's not running around trying to save the world, but he is trying to provide optimal service for his clients.

"When clients come in to my office, we have the discussion. 'Do you give to charity?' If they don't, we politely move on. But for people who do, we look at how they're giving so it can be more meaningful and impactful for them in the future," he said. ■

Smarter giving

By Geoff Kirbyson for the Free Press

The vast majority of Canadians are actively engaged in philanthropy but they're doing it without much — if any — help from their advisors.

And that's puzzling to Stephen Webb, chairman of the Manitoba chapter of the Canadian Association of Gift Planners (CAGP).

He believes philanthropic planning should be part of an overall wealth management strategy that includes

retirement, investment management, and estate and tax planning.

Considering that Winnipeggers are among the most generous people in Canada, if not the world, it behooves financial planners to be able to handle this side of their affairs, Webb said.

"I know that more than 90 per cent of my clients are engaged in a philanthropic activities every year, and whether that's making a donation at the door, giving at their place of worship, or giving towards a specific cause or capital campaign, I want to make sure they're doing it in the most efficient manner possible," he said.

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'They gave us joy. They gave us our granddaughter'

Margaret Keillor has a very personal reason for choosing to support the Children's Hospital's Neonatal Intensive Care Unit (NICU).

That reason is a healthy, happy nine-year-old girl named Kyla.

Kyla is Margaret's granddaughter. And Grandma Margaret credits the NICU and its amazing staff with saving her granddaughter's life.

Kyla was born at 26 weeks, weighing only one pound, six ounces. She was taken immediately to the NICU, where she lived for over a month. As a tiny baby, Kyla needed feeding tubes. Nurses monitored her breathing and feeding constantly.

Her mother remembers, "The staff

at NICU were amazing to our family. They always took the time to answer our questions and concerns. The nurses even chose sheets and hats that they thought would suit her."

As well as caring intently for Kyla, staff in the NICU spent time teaching Kyla's parents how to care for such a small infant. "Even changing her diapers in an incubator was a challenge!"

But Kyla pulled through. Now she's an active girl who loves art, games, reading and swimming. She is always outside, and her favourite thing is camping. She has no health problems, and has caught up on the growth charts with other kids her age.

Grandma Margaret has remained deeply grateful to the NICU. When her husband passed away, she decided she wanted to support something that gave them both great joy.

Grandma Margaret Keillor is deeply grateful to the NICU. Submitted photo



And their greatest joy came from Kyla. So Margaret decided to include the Children's Hospital Foundation of Manitoba in her will. She knows that her donation will help children in the NICU and their families, just like hers.

This is a wonderful way to support Manitoba's children far into the future, and really is a legacy of great compassion.

As Margaret says, "I wanted to do something that gave us great joy. The

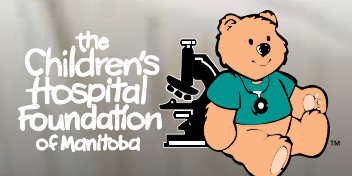
NICU gave us joy, they gave us our granddaughter. Becoming a Papa was my husband's proudest moment."

If you would like to find out more about supporting the children who need us with a gift in your own will, please contact Tania Douglas at 204-787-4040 or email tdouglas3@hsc.mb.ca for details. It is a powerful yet easy way for you to support children's health far into the future. ■

Because my wife loved working with kids, to honour her memory, I included a gift in my will.

For a confidential discussion about how you can help sick and injured children as your legacy, contact Courtney today at cleiman@hsc.mb.ca or 204-787-8588.

goodbear.ca



...because our sick children need YOU now.

Anyone can be a philanthropist

By Jennifer McFee *for the Free Press*

There's no time like the present to consider leaving a charitable contribution to benefit others in the future.

Ruth MacKenzie, president and CEO of the Canadian Association of Gift Planners (CAGP), outlines the importance of these meaningful gestures.

"Our Leave A Legacy campaign is important because it's the one voice we have to reach out so that people might consider leaving a gift in their will to a cause or a charity that they care about," she says.

"That's really important because the number of people leaving a gift to a charity in their will is quite low, so there's a lot of opportunity that can happen simply by raising awareness."

CAGP works primarily with professionals who, in turn, work with donors, she adds.

"One in four have indicated they would leave a gift to a charity in their will if they were asked. But the issue is that not enough organizations are asking and not enough professional advisors are suggesting that to their clients," MacKenzie says.

"We work with fundraising professionals and we also work with financial advisors to help them understand how important it is to engage in philanthropy. We show them how this is an important level of service and support that they can provide to their clients."

By reaching out to the professionals, CAGP can provide the information and resources they need to support donors in strategic charitable giving.

"Most charities are pretty strapped for money. They often struggle to raise funds to do their important work and they think they need to focus on what's going to bring money in now. They feel like they

don't have time to focus on something that's going to bring money in 10, 15, 25 years," MacKenzie says.

"The Leave A Legacy program demonstrates to charities how easy it is and educates financial advisors who can provide that window of opportunity to their clients. It's also raising awareness with individuals that this is something that's really easy to do."

For donors, MacKenzie suggests they work with charities in advance if they have the chance.

"Often charities are surprised at gifts they get in someone's will since only about one in 10 donors disclose to the charity ahead of time. We encourage people to let the charity know in advance because it gives them a chance to say thank you," she says.

"I think a lot of times people have this notion that you have to be wealthy to give and that's not the case, especially in terms of leaving a gift in your will. This is a time when anybody can leave a gift."

"Also, if you want to designate it for something special, the charity can help you figure out where their need is the greatest and where you can donate to something that you really care about."

It's important for people to know that anybody can be a philanthropist, MacKenzie adds.



Ruth MacKenzie is president and CEO of the Canadian Association of Gift Planners.

"I think a lot of times people have this notion that you have to be wealthy to give and that's not the case, especially in terms of leaving a gift in your will. This is a time when anybody can leave a gift," she says.

"One of the strategies we encourage people to do is to look after themselves as they age and look after their kids — but once that's looked after, is there room to give? It's something that's really easy to do and it's a very, very powerful way to say something about your life as an individual and how you care about community."

At this year's national CAGP conference, about 350 people from across the country gathered in Winnipeg from April 11 to 13 for the sold-out event. Attendees included professional advisors, lawyers, estate planners, accountants and fundraisers for charities, who had the

chance to learn about the tax advantages of giving. Other themes included best practices in terms of donor stewardship and education about how to give in a more strategic way to maximize the impact of a donation for a charity as well as for the donors themselves.

"CAGP is there to help individuals identify a cause or a charity that they care about and connect them with the fundraising professionals in their community. For many, that's a global lens these days. For others, they want to make a gift that impacts their community where they lived," she says.

"The professionals involved with CAGP are ready to help. Any gift is usually money very well spent in a charity and it can have a real impact." ■

For more information, visit
winnipegfreepress.com/leavealegacy

WHO CAN HELP YOU TO LEAVE A LEGACY™?

— Source: CAGP website

- attorney/lawyer
- accountant
- estate planner

- financial planner
- stock broker
- insurance broker

- planned-giving officer
- philanthropy consultant

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For more information, visit winnipegfreepress.com/leavealegacy

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For more information:

Call: 204 987.4569

Email: foundation@cpamb.ca

Web: bit.ly/CPAmbFoundation



Why your will is important

Your will or testament guarantees your property and assets will be regulated according to your desires. Without a will, there is no mechanism in place to make a bequest. Below are some steps you should take to ensure that your wishes are granted:

1. Make a detailed list of your assets (financial, real estate, vehicles,

jewelry, collectibles, musical instruments, etc.)

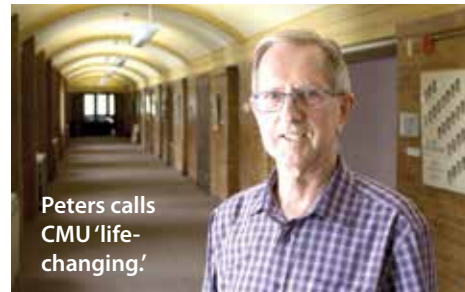
2. Make a list of organizations or causes you would like to support.

3. Set up an appointment with your professional advisor (financial analyst, attorney, or planned giving officer) to discuss your options. Your professional advisor can help you decide which option(s) will work best for you and your family. ■

Donating to CMU a wise investment

By Aaron Epp

For Hugo Peters, donating to CMU is a wise investment because it means contributing to the lives of students. "I've invested in all kinds of things in my life ... some of which made money, but I've never regretted investing in people," says Peters. "It's the best investment because it's long-term. These are people who are going to make the world move along in directions that are good." Peters was thrilled to see his grandson



graduate from CMU in 2017, 54 years after he himself graduated from one of the university's founding colleges. "I was hoping of course he would have that same life-changing, redirecting experience I had that is about more than just education — it's really (about) forming who you become," he says. ■



Imagination and curiosity are at the heart of learning at Canadian Mennonite University

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Contact Dori Zerbe Cornelsen dzcornelsen@cmu.ca | 204.487.3300

CMU | CANADIAN MENNONITE UNIVERSITY cmu.ca/give



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It's about children with disabilities having the same opportunity to play, learn and be independent just like everyone else.

Your donation to the Children's Rehabilitation Foundation will ensure children living with disabilities have specialized equipment and modified recreation programs they need today and in their future. When you leave a legacy with the Children's Rehabilitation Foundation, you are changing lives.

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A WINDOW ONTO

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Université de Saint-Boniface

Au cœur d'une communauté.

ustboniface.ca/donate
204-237-1818, ext. 409



Hôpital St-Boniface Hospital
FONDATION • FOUNDATION

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FOR GENERATIONS TO COME LEAVE A LASTING LEGACY

Leaving a gift in your will to St. Boniface Hospital is the beginning of a healthier future. You can help ensure that health, hope, and healing are always available to those in need.

***For more information about leaving a gift in your will, please contact
St. Boniface Hospital Foundation at 204-237-2067, or visit saintboniface.ca***

ST. BONIFACE HOSPITAL'S EXCELLENT CARDIAC CARE SPARKS DONOR SUPPORT

A GIVING HEART, A HAPPY HEART

In 1988, Judy Balabas' mother flew from Flin Flon to Winnipeg to receive two heart valve replacements at St. Boniface Hospital. Nearly 25 years later, in May of 2012, Balabas herself also had to have a heart valve replaced at the Hospital.

From pre-operative meetings with doctors explaining her procedure, to post-operative care from the cardiac team at St. Boniface Hospital, Balabas knew she had a tremendous amount of support throughout the entire process.

"The care I received was just phenomenal. Everything was explained to me so well, so I knew what to expect. And the staff who worked with me went above and beyond."

She fondly recalls staff bringing her a cup of coffee after she was transferred from the Intensive Care Unit to her recovery room after surgery. This special touch, among many others, went beyond the call of duty. Allowing two best friends, Sharon Campbell and Jean Moor, to be present during pre-op and post-op meetings assisted in calming her fears. Having a strong support system in place ensured that she always felt cared for.

With a healed and joyful heart, Balabas decided to leave a gift in her will to St. Boniface Hospital Foundation.

*Judy Balabas,
St. Boniface Hospital
Foundation Donor.*

"The cardiac research being done right now at St. Boniface Hospital is so crucial," says Balabas. "It's really important to me – I mean, look at the quality of life I have now."

This is just one example of Balabas' generous spirit.

She not only donates to various causes each year, including St. Boniface Hospital Foundation, but she also donates her time playing piano and bringing joy to residents in nursing homes in Winnipeg and Stonewall.

Balabas always knew she wanted to be a music teacher – she decided that would be her career when she was just eight years old.

Growing up in Flin Flon, Judy moved to Winnipeg to attend teacher's college and went on to teach music and French for 28 years. After retiring, she was tired and looking for a way to de-stress. Music, as always, was her therapy.

When she saw the advertisement for a volunteer piano player position at various personal care homes in the city, she knew she would be a good fit. It's now been a pastime for Balabas and her friends, Jacky Molyneux and Joan Zaretsky, for nearly a decade.

"It's just been so rewarding," Balabas said. "You're giving your time. But, you know what? You're so fulfilled by the interactions."

Balabas' healed heart is both a happy and giving heart, and St. Boniface Hospital Foundation is grateful for her gift, which will help patients at the Hospital for generations to come.

**PLEASE CONTACT A ST. BONIFACE HOSPITAL FOUNDATION
REPRESENTATIVE TO DISCUSS YOUR LEGACY:**



NANCY MILITANO
Development Officer
204-237-2068
nmilitano@stbhf.org



GARTH JOHNSON
Development Officer
204-235-3570
gjohnson@stbhf.org

St John's College

Be a part of their future

"This place saw me become an adult, a woman, a scientist, a teacher assistant, a cook and a baker, an athlete and leader, but it also saw me fail and fall, struggle and suffer and with care, love, humility and kindness put me back on my feet, held my hand and kept me striving to achieve my goals and my dreams reminding me that I am human too and that I was going to come through... It is of great pride and pleasure to say I am a Johnian."

Viridiana Urena Ramirez, '17



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community
within the
University of
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For more information on Planned Giving please contact Rick Brownlee, Manitoba Sports Hall of Fame at 204-925-5736 or by email at halloffame@sportmanitoba.ca.

Visit our website at www.manitobahalloffame.ca



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Conductive Education rehabilitation helps children and adults living with neurological motor disabilities gain **mobility, independence, and confidence** while promoting **inclusiveness, positivity, and accessibility** for everyone.

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DIFFERENCE
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Planned gifts in support of the Society for Manitobans with Disabilities (SMD) are about seeing Ability in disability for the future of children, youth and adults with disabilities.

Everyone knows someone with a disability. It may be you or someone you love.

Your gift helps Jocelyne and other Manitobans with disabilities become Unstopp**ABLE**.

For more information please contact us:
204-975-3111
www.smd.mb.ca
foundation@smd.mb.ca

Honouring Kim's work

Dr. Kathleen Jones and her late wife, professor Kim Clare, were both very successful in the academic world, eventually pursuing their career goals with the University of Manitoba.

For the last 20 years of her career Kim worked as the director of the Inner City Social Work Program, a program designed to support students who have traditionally faced systemic barriers common to inner-city life experience such as poverty, racism, school failure and marginalization. All of these factors prevent accessibility to post-secondary education.

During her tenure, Kim worked hard to ensure the option for part-time study was included, so those whose life commitments wouldn't allow for full-time study could nonetheless pursue a career in social work.

Upon Kim's untimely death in 2014, her friends and family wanted to honour her memory and contribute to fulfilling her vision of increased accessibility to higher education. Ultimately, the Kim Clare bursary was established, which offers support specifically for part-time students in the Inner City Social Work program.



Dr. Kathy Jones (left) and Kim Clare.

Her unwavering commitment to her students, colleagues and the profession of social work had a deep impact on the community; she is remembered with great admiration, respect and love.

Kathy continues to make gifts to the Kim Clare Bursary and has also included a gift in her will. She feels that "Kim would be proud to know that her work over her entire lifetime is being remembered and supported into the future." ■

B R E A T H E
the lung association

1 in 5 Manitobans suffer from lung disease.

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GIVING



A better world through **STRATEGIC CHARITABLE GIVING**

The Canadian Association of Gift Planners is the only organization in Canada that brings together charitable representatives with donor advisors in one professional association. Among our fundraising, legal and financial peers, we are looked to as the experts in strategic charitable gift planning.

ABOUT GIFT PLANNING

Strategic charitable giving is a focused and financially strategic approach to philanthropy that results in maximum benefits for both the charity and individual donor.

Strategic charitable gift planning is a donor-centred process of planning current and future charitable

gifts in a way that meets the donor's philanthropic goals and balances personal, family and tax considerations.

WHO IS A GIFT PLANNER?

Gift planners are leaders in Canada's charitable community. They play key roles expanding the fundraising options available to

charitable organizations.

Gift planners are impacting Canada's philanthropic landscape in a meaningful way, providing current and prospective donors with new and innovative ways of achieving their philanthropic dreams.

Gift planners are experts with a unique body of knowledge regarding a range of giving options, such as bequests, gifts

of securities, gifts of insurance. They are informed and conversant in the challenging technical aspects of the various giving vehicles and the potential financial benefits of each.

Gift planners embody or strive for a range of technical and enabling core competencies that reflect the skills, expertise and qualities essential

CONTINUED >>



Make yours a living legacy.

When you invest in United Way's endowment, the Tomorrow Fund, your gift goes right to work here in Winnipeg, changing lives **today** and **for generations to come**.

For more information or to discuss your goals for legacy giving, contact Vanessa Mackeil at **204-924-4291** or email legacygiving@unitedwaywinnipeg.mb.ca

UnitedWayWinnipeg.ca/tomorrowfund

ADVANCING HEALTHCARE



LEAVE A LEGACY

"Establishing an endowment fund was a way for me to honour the memory of my mother and support Mental Health at The Vic."

Healthier futures begin with you. By remembering The Vic Foundation alongside your family and friends, you can advance healthcare for those who need it most.

Contact Rena Molinari, Director of Development at **204-477-3126** or rmolinari@vgh.mb.ca

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**JEWISH FOUNDATION
OF MANITOBA**



**THE ENDOWMENT
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YOUR STORY. YOUR LEGACY.

The Endowment Book of Life offers you an opportunity to leave a historical and financial legacy to the community.

Make a promise to leave a bequest to the Jewish Foundation of Manitoba and your family story is inscribed in the Endowment Book of Life. Launched in 1998, the EBOL now has over 800 community stories.

HOW DOES IT WORK?

There are absolutely no fees to participate in the Endowment Book of Life.

You make a promise to leave a bequest – this promise welcomes you into the EBOL program.

You can leave an undesignated bequest that will be used for grants and scholarships at the discretion of the Foundation.

Or, you can designate your bequest to support specific charities, programs, services, or scholarships.

For more information, please contact **Rob Berkowits**, Director of Development & Gift Planning
Jewish Foundation of Manitoba | Ph: 204.477.7522 | US/Canada Toll-Free: 1.855.284.1918
rob@jewishfoundation.org | www.jewishfoundation.org

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for excellence in a complex philanthropic environment.

PROFESSIONAL ADVISORS

Professional advisors work in strategic charitable gift planning in the fields of accounting, law, insurance, financial planning and investment planning, providing philanthropic advice to their clients as current or prospective donors and to charitable organizations.

WHY IS GIFT PLANNING SO IMPORTANT?

Gift planning expands on traditional fundraising campaigns, enabling charities to raise funds, generate revenue more efficiently and attract and retain donors while achieving an unparalleled return on investment.

Gift planning engages donors in the wonderful process of giving by encouraging donors to explore their ultimate dreams, their financial plans today and after death, and most importantly, their philanthropic goals and wishes.

Gift planning encourages donors to consider their lasting legacy as well as their current and final wishes, encouraging them to continually explore these issues, utilizing tools provided by charitable gift planners or professional advisors.

CODE OF ETHICS

All members of the CAGP are required to commit to and abide by a stringent code of ethics which outlines principles, guidelines and practices they will adhere to in their relations with current and prospective donors.

— Source: cagp-acpdp.org



ALS

THREE LETTERS THAT CHANGE SOMEONE'S LIFE FOREVER.

ALS (Amyotrophic Later Sclerosis), also known as Lou Gehrig's disease is a life limiting disease where 90% of people diagnosed will die within three to five years, some within a few short months.

The number of people diagnosed with ALS continues to grow in Manitoba, we need your HELP!

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Bequests make a significant impact on the lives of our students and the future of The University of Winnipeg and The University of Winnipeg Collegiate.

UNIVERSITY OF WINNIPEG

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Bunny Gutnik
Planned Giving Officer
204.789.1471
b.gutnik@uwinnipeg.ca



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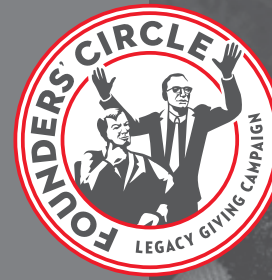


SUPPORT THE NEXT GENERATION OF WOMEN WHO WILL MAKE A DIFFERENCE IN OUR WORLD

The Marian Legacy Society is for alumnae and friends who believe in the future of St. Mary's Academy and the educational vision of the Sisters of the Holy Names of Jesus and Mary. Include St. Mary's Academy in your estate plans and help our young women help our world.

Contact our Advancement Office at 204-478-6030

ST. MARY'S ACADEMY
EDUCATING YOUNG WOMEN SPIRIT, MIND AND BODY
550 Wellington Crescent, Winnipeg, MB, R3M 0C1 | www.smamb.ca



Bob and Pat Migliore have joined the Royal MTC Founders' Circle

Will you join us?

If you have visited the Royal Manitoba Theatre Centre, you may have seen the friendly faces in the picture above. Bob and Pat Migliore have been volunteering with Royal MTC since the 1970s and as their family has grown up and had children of their own, they too have become volunteers.

With three generations of volunteers all working together to support Royal MTC, Bob and Pat have decided to deepen their commitment by becoming members of our Founders' Circle.

For more information on becoming a member of the Founders' Circle, please call Kris Olafson at (204) 954-6412 or email kolafson@royalmtc.ca

Bob and Pat invite you to join them. Your most personal and lasting gift to Royal MTC can be of any size.

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MTC
MANITOBA THEATRE CENTRE

THE
WINNIPEG
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For Good. Forever.
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Help our grads become industry leaders

Red River College is committed to innovation. Our programs, labs and classrooms are industry-approved, and our grads are trained for the jobs of today and tomorrow. Your Legacy gifts help us fulfil our mission – of challenging, innovating and finding solutions for a better future.

Contact us today: development@rrc.ca | 204.632.2086 | rrc.ca/development



WHAT WE'RE DOING IS WORKING.

 **RED RIVER COLLEGE**

THE CANADIAN ASSOCIATION OF GIFT PLANNERS, MANITOBA CHAPTER

CAGP Manitoba is the province's premier organization for fundraisers and professional advisors — lawyers, financial advisors and accountants — to network, share ideas and develop their knowledge of current issues in gift planning.

The Chapter hosts regular educational meetings where members connect with their colleagues and hear from expert speakers. We encourage anyone with an interest in fund development to attend our meetings, which will help you to serve your donors or clients better. Members of the CAGP are given a discount on the registration fee and are given opportunities and insight into upcoming events throughout the province.

The chapter also runs an inspiring LEAVE A LEGACY™ awareness program designed to encourage people to leave a gift through their will or any other planned giving method to a charity or non-profit organization of their choice.

If you have any questions, please feel free to contact Stephen Webb, CAGP Manitoba Chapter chair, at 204-272-9670 or stephen@entrustfinancialservices.ca

— Source: cagp-acpdp.org/en/leave-a-legacy



Canadian Association of Gift Planners



For more information, visit winnipegfreepress.com/leavealegacy

Become a Park Visionary and Begin Your Legacy

Imagine... your gift creating a lasting impact on the future of Assiniboine Park and Assiniboine Park Zoo.

Assiniboine Park continues its transformation into a destination of international renown. And it's all happening right here in your backyard.

Your legacy gift has the power to impact current and future generations.



Learn more about becoming a Founding Member of the Assiniboine Park Visionaries. Call 204 927 6027 or visit assiniboinepark.ca



Making a difference

Did you know with the use of an iPad, a student who is blind can photograph class material at their desk and have it read it back in a different format? In the past, blind students sat at the back of the class using closed-circuit TV. Now, they are included and have the same opportunities. Just ask Robb Hempel. Robb, a mechanic by trade, lost his sight at the age of 33 due to diabetic retinopathy. Approaching his vision loss

as a challenge, through CNIB he learned to read Braille, re-learned to cook and sorted out how to get around Winnipeg on his own. Beyond those challenges, Robb wanted back into the job market, in a meaningful job. Robb, along with Shop CNIB staff member Chloe Porter, devised a system that allows people of any vision level to work in any part of the CNIB store — often using the technology sold in the store. Now, CNIB provides a



Robb with Mayor Bowman.

work experience program through Shop CNIB to offer Manitobans with sight loss the skills, confidence and resources to find meaningful paid work. As for Robb, he now works full-time at a job he loves and still finds time to cook and volunteer. ■

Leave a legacy gift to CNIB and change what it means to be blind today.

We would love to talk with you about your legacy planning. We welcome sharing what we do at CNIB Winnipeg with you, what opportunities are available and how your gift will make a real difference.

To explore the opportunity further, please contact Margot Ross, Manager, Philanthropy to arrange a meeting and personal tour of CNIB Winnipeg. 204-789-0950; margot.ross@cnib.ca;

www.cnib.ca



Thank you for considering a place for CNIB Winnipeg in your will.

Rossbrook House Foundation Legacy Circle

Bill and Maureen Watchorn believe that the work that Rossbrook House does is important. And that is why they have been so involved with Rossbrook for the past 20 years. It's also why they have made plans to continue their support.

In the late 1990s, Bill helped to recruit a small group of business leaders to raise funds for an expansion to Rossbrook House. Bill was the first Chair of the Rossbrook House Foundation in 2006 and was a member of that board until 2016.

"We witnessed first-hand the great work Rossbrook House was doing in the community and the great impact it was having on the kids," Bill said.

"The kids from Rossbrook House were very much on our minds," Bill said when he and Maureen revised their wills in 2012. "It was a short leap for Maureen and me to include a legacy gift for the Rossbrook House Foundation in our wills."

Their planning and generosity will benefit the children and youth who walk through the doors of Rossbrook House, for many years to come. "Rossbrook House is a very valuable organization in our city. We feel our legacy gift is the best way we can continue to support it," Bill said.

For more information about the Rossbrook House Foundation Legacy Circle or planned giving, call Tom Thompson at 204-949-4097. ■



**LEAVE A
LEGACY...**



that will live on in the smiles of the
children and youth at Rossbrook House

658 Ross Ave | Winnipeg | CALL 204.949.4097
rossbrookhouse.ca/foundation/planned-giving

LET YOUR LEGACY *grow*

Leave a gift that will grow
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mark on FortWhyte forever.
All members receive permanent
on-site acknowledgement, and each
fall we dine together at FortWhyte
to celebrate, learn and connect. It's
one of a kind. And it's a lot of fun."*

DOUG HARVEY — FORT WHYTE LEGACY SOCIETY CHAIR,
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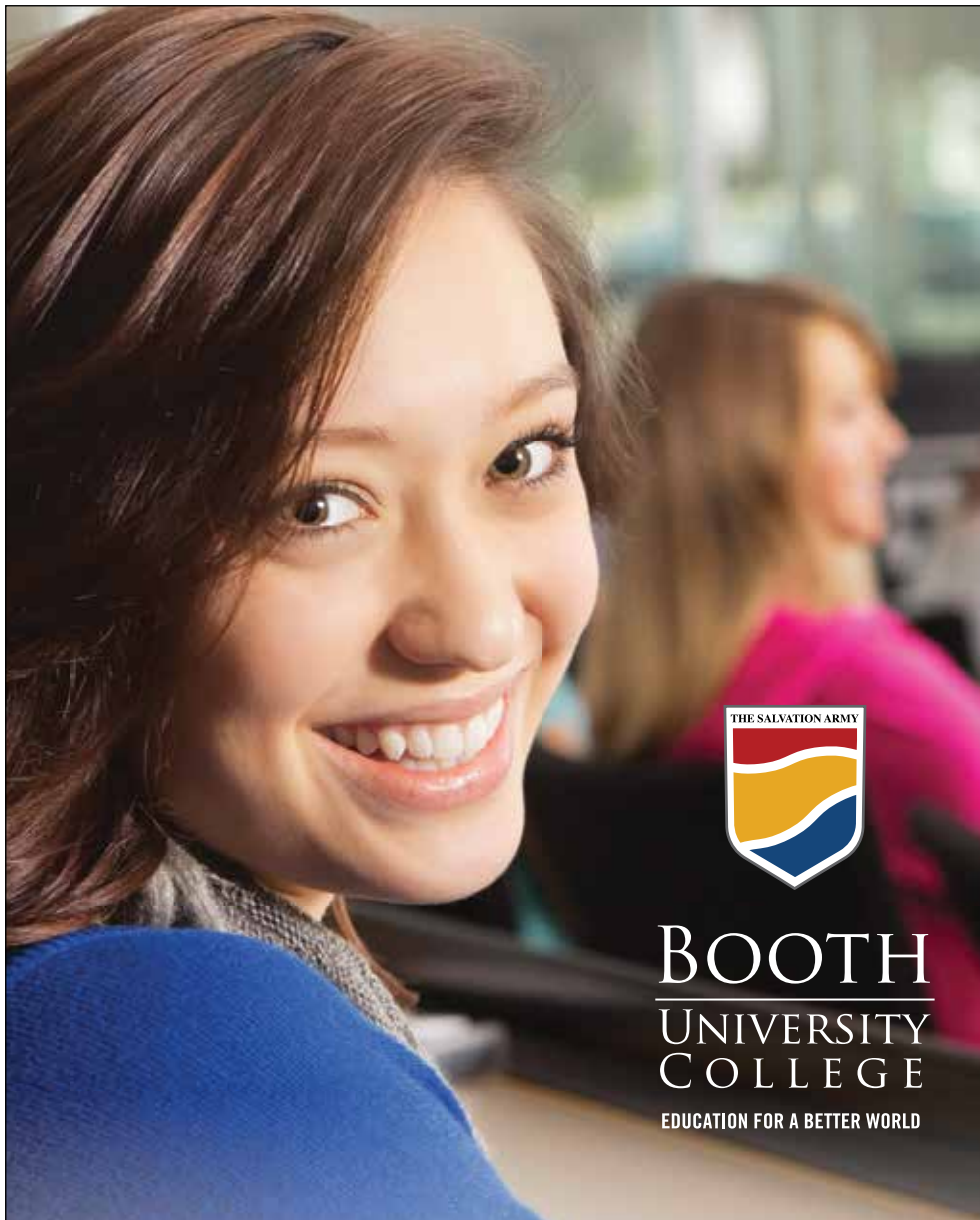


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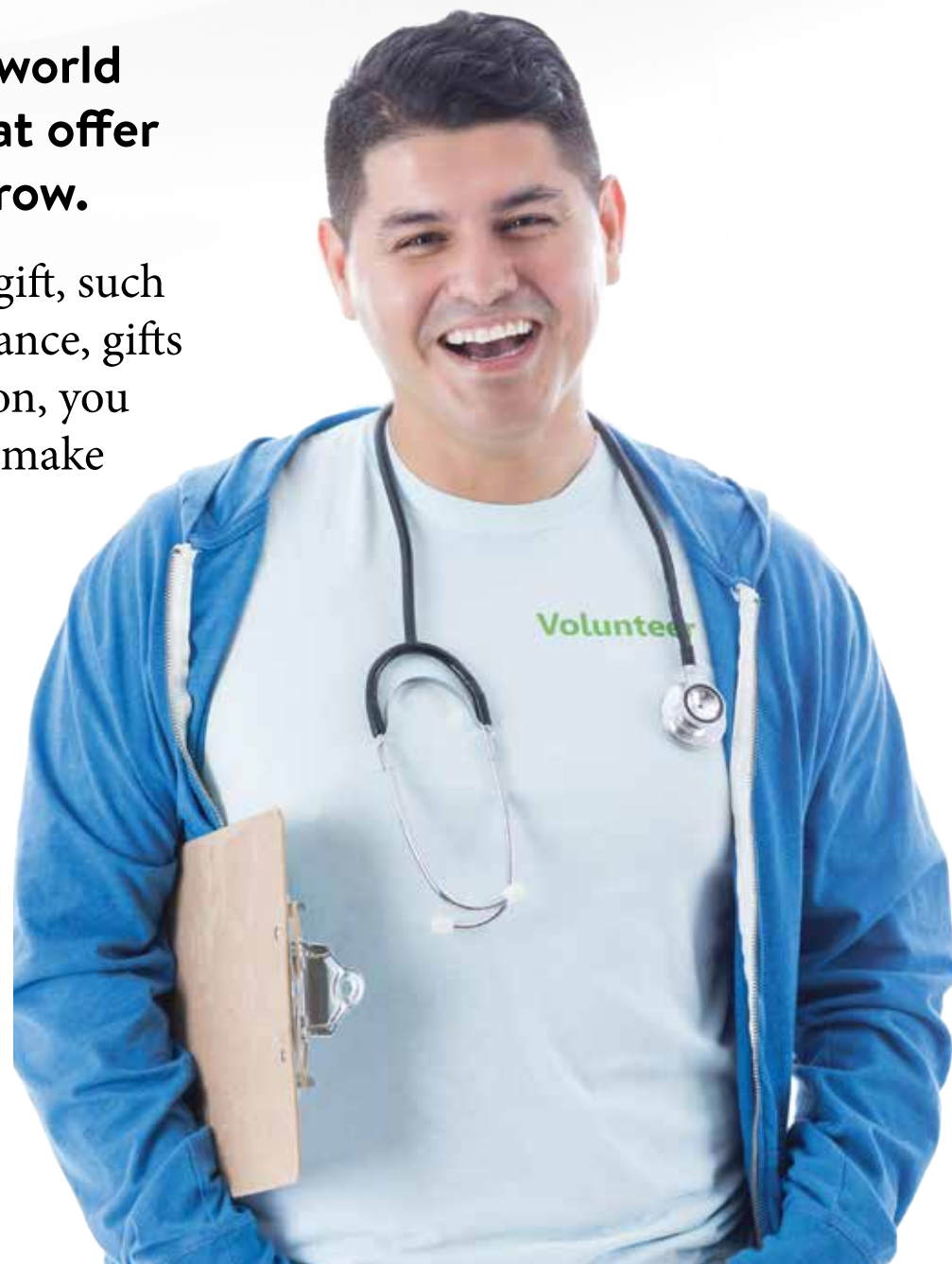
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