

## WHO WE ARE – WHAT WE DO

Established in 2002, The Willow Foundation is a non-profit registered charitable organization run by a volunteer board of directors. The Foundation provides support and life enrichment programming to older adults served by the Halton Region Services for Seniors Division. This includes three long-term care homes (Post Inn Village - Oakville, Creek Way Village – Burlington, Allendale - Milton), three Adult Day Programs (Silver Creek Place - Georgetown, Milton Place – Milton, Friends Landing – Milton) and four assisted living programs (Bonnie Place I & II – Burlington, Wellington Terrace – Burlington, Martin House – Milton, John R. Rhodes Senior Residence – Oakville). The Foundation encourages and supports further education of the Region's clinical staff by offering an annual bursary.



## YOUR LEGACY

A financial investment in The Willow Foundation is your opportunity to enrich the lives of older adults in your community.

### GIFTS CAN INCLUDE

- Wills and Bequests
- Securities
- Life Insurance
- RRSPs and RRIFs
- General Donations
- Spirit of Giving Campaign
- Corporate Sponsorship
- Gifts in Memoriam

### TO LEARN MORE, PLEASE CONTACT US

**The Willow Foundation**  
203 Georgian Drive  
Oakville, ON  
L6H 7H9

905-825-6000 Ext. 4049  
willow.foundation@halton.ca  
www.willowfoundation.ca

Registered Charitable # 86903 1385 RR0001

Scan the QR  
code to make a  
Donation today



Providing support and life enrichment programming to older adults served by the Halton Region Services for Seniors Division.

**YOUR GIFT**  
**YOUR LEGACY**  
**YOUR COMMUNITY**



Create a lasting legacy that will  
enrich lives in your community,  
now and for years to come

## MAKE A DIFFERENCE



Just imagine the impact legacy giving can have on future generations. Gifts in Wills are vital to The Willow Foundation's work with older adults. They provide secure funds that go towards, art & music therapy, VR technology, social events, BBQs, boat tours, tea and ice cream socials and more. Whatever the size of your legacy gift, it will reach those who need it most. Together, with your charitable donation, we will ensure a profound and lasting impact.

**Thank you for your generosity, your gift helps foster a stronger, more supportive community for older adults that call Halton Region home.**

## CREATE A LASTING LEGACY

Planned giving allows a donor to make a substantial gift and at the same time provides valuable tax benefits.

### WILLS AND BEQUESTS

A charitable bequest is a simple way to leave a legacy gift. Writing your will puts you in control and gives you the power to create a lasting legacy in your community. Bequests are vitally important, your bequest will distribute your specific gift from your estate to The Willow Foundation through your last Will and Testament. Your charitable gift can be in the form of a fixed dollar amount or a percentage of assets from a settled estate.



### GIFTS OF SECURITIES

If you are considering giving to The Willow Foundation and you own securities that have appreciated significantly in value, you can derive additional benefit by donating the securities directly to us rather than donating cash. To encourage charitable giving, taxes have been eliminated on capital gains if you donate the shares to a charitable organization such as The Willow Foundation. This tax advantage can substantially reduce the cost of your charitable donation and might enable you to give more than originally planned.

## GIFTS OF LIFE INSURANCE

A gift of life insurance is a way to make a generous contribution for a relatively low cost by entering into a new insurance policy and naming The Willow Foundation as owner and beneficiary. In doing so, you will receive charitable donation receipts for the annual premiums you pay. You may also wish to use existing paid up policies that are no longer essential to your family and have the ownership and beneficiary designation transferred to The Willow Foundation with significant current tax savings to you.

### RRSPs and RRIFs

One of the most tax effective ways to leave a legacy gift is by naming The Willow Foundation as a partial or full beneficiary of your RRSP or RRIF. A charitable receipt can be applied up to 100% of net income in the year of death and the preceding tax year.



The Willow Foundation encourages you to consult with your own legal and financial advisors when considering making a legacy gift (planned gift). Your advisors can help you determine the most suitable gift that will meet your financial and philanthropic goals.