

Supporting Casey House Foundation through a legacy gift is a concrete expression of your commitment to compassionate health care. It is a lasting legacy of kindness and generosity.



Friends InDeed Legacy Society

The Friends InDeed Legacy Society was created to honor and recognize donors who have made a long term commitment to Casey House's mission through their legacy gifts, and to whom we are deeply grateful.

Benefits of the Friends InDeed Legacy Society

- ✦ Name recognition, with permission, in Casey House's newsletters, annual report and website.
- ✦ Invitations to Casey House's Donor Appreciation receptions and Annual General Meeting.
- ✦ Updates on programs and activities through Casey House's newsletters.

Casey House Foundation wishes to acknowledge and thank those donors who decide to provide for Casey House in the future by way of a legacy gift. By informing us of your intention today, you will help Casey House Foundation plan for the future with confidence, and inspire others to follow your kind and generous example.

We're here to help. For more information about leaving a legacy gift to Casey House Foundation, please contact:



CASEY HOUSE

Casey House Foundation
119 Isabella Street
Toronto, ON M4Y 1P2
Tel: 416-962-7600 ext. 233
Fax: 416-962-5595
E-Mail: heart@caseyhouse.on.ca
www.caseyhouse.com

Charitable Business Number: 10687 8374 RR0001

This information and material is intended to provide general examples and is for illustration purposes only. Casey House Foundation does not give legal or financial advice. Casey House Foundation strongly recommends that donors review this information and material with independent legal, financial and/or tax advisors.



CASEY HOUSE

Dream Beyond What Is Possible



Casey House has been providing exemplary treatment, support and palliative care to women and men living with HIV/AIDS and their families since 1988.

Casey House continues to be recognized around the world as a leader in HIV/AIDS treatment, support and palliative care.

This extraordinary legacy of compassionate care, started by June Callwood and a group of dedicated volunteers, is possible in part, because of our donors who continue to dream beyond what is possible.

Casey House's clinical and supportive programs include:

- Clinical and social work support at 9 Huntley and through the Home Hospice Program
- Child Care Fund
- Resident Care and Comfort Fund
- Outreach to the homeless and under-housed
- Mental health and addictions support services
- Recreation Therapy
- Complementary Therapy

**Legacy Giving at Casey House Foundation
Friends InDeed Legacy Society**

What is a Legacy Gift?

A legacy gift is a form of charitable giving that allows you to make a future gift to Casey House Foundation today and is part of a larger estate planning process. Legacy giving offers a number of ways for you to support Casey House.

What better way to remember an organization that had an impact on your life or the life of someone you love than to make a contribution from your estate. A legacy gift is an inspiring and joyful way to ensure that your values and dreams for the future of Casey House become reality for you, your family and community. Every legacy gift, regardless of the amount, is important.

Benefits of making a Legacy Gift to Casey House Foundation

- ✦ Contributes to the compassionate care, support and treatment of hundreds of people living with HIV/AIDS.
- ✦ Improves the quality of life for people living with and affected by HIV/AIDS (sons or daughters, partners, friends, siblings, parents).
- ✦ Provides a stable and enduring source of support for Casey House.
- ✦ Demonstrates your personal values and beliefs.
- ✦ May reduce estate taxes.
- ✦ Allows you to make a larger gift to Casey House than you thought possible.
- ✦ Provides a meaningful and enduring legacy to Casey House.

Bequest

A bequest is a thoughtful way to make a significant gift to Casey House Foundation without affecting your current finances.

- ✦ Bequests create a strong future for Casey House and ensure Casey House continues to be the leading organization in the treatment, support and palliative care of people living with HIV/AIDS.
- ✦ A gift served through a bequest allows you to make a tax-effective gift as it may reduce the tax payable on your final income tax return.
- ✦ Your bequest may be directed to support Casey House's greatest needs or you may designate your bequest toward a particular area of Casey House's work that is of interest to you.



Gifts of Life Insurance

Gifts of life insurance can be made by naming Casey House Foundation as a beneficiary of the policy or by assigning ownership of your policy to Casey House Foundation. Life Insurance is also a wealth replacement tool to help you make charitable gifts through your estate while providing for your loved ones.

- ✦ You can help to make a difference in the lives of men and women living with HIV/AIDS through an investment in our mission.
- ✦ A gift of life insurance allows you to make a larger gift to Casey House Foundation than you ever thought possible.
- ✦ A gift of life insurance is a simple, thoughtful and often overlooked way to make a gift to Casey House Foundation.
- ✦ Gift proceeds directed to Casey House Foundation are not subject to probate and estate fees as your life insurance exists outside the estate settlement process.

Gifts of Retirement Fund Assets (RRSP's and RRIF's)

The balance remaining in your retirement account after your death is subject to taxation. By designating Casey House Foundation as the beneficiary of your RRSP or RRIF, you can make a sizable charitable contribution while still providing for your loved ones.

- ✦ Your gift will be a lasting legacy to you, your family or anyone you may wish to honour.
- ✦ You retain full access to your retirement funds for use during your lifetime.
- ✦ Funds that otherwise would be lost to taxation are re-directed towards providing critical treatment, support and palliative care services in your community.
- ✦ The beneficiary designation is revocable, meaning it can be changed if your financial and/or life circumstances change.

Gifts of Publicly Traded Securities and Mutual Funds

A legacy gift through your will using publicly traded securities or mutual funds will significantly reduce the tax paid on capital gains. It's a valuable tax benefit.

- ✦ You can significantly reduce the capital gains tax paid when securities and mutual funds are donated directly to Casey House Foundation.
- ✦ If you sell the securities first and then donate the proceeds, you will be subject to capital gains tax on the appreciated value of the shares.