

THE PRINCESS MARGARET

## Estates and Gift Planning

# IS IT TIME TO UPDATE YOUR WILL?



### The Importance of Planning

Just like you're providing for your loved ones and thinking about the future of the causes you care about, The Princess Margaret Cancer Foundation is doing the same. We're focused on a future of better outcomes for cancer patients.

As we reach different milestones in life our priorities shift, and our estate plans should evolve with them. Keeping your Will up to date ensures that your wishes are honoured and that your loved ones have security. This guide offers helpful tips to align your estate plan with your current goals.

### When Should I Revisit My Estate Plan?

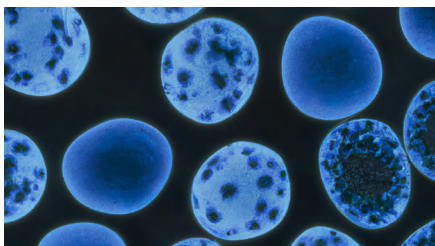
Wondering when to revisit and revise your estate plan? Check as many of the following boxes as apply to you:

- |  |  |
|--|--|
| <input type="checkbox"/> A family member has recently passed away                      | <input type="checkbox"/> You wish to change guardians, executors or trustees               |
| <input type="checkbox"/> Your wishes have changed                                      | <input type="checkbox"/> The value of your assets has increased or decreased substantially |
| <input type="checkbox"/> New family members have been born or adopted                  | <input type="checkbox"/> You have just acquired or lost a significant asset                |
| <input type="checkbox"/> You've recently married, divorced, or re-married              | <input type="checkbox"/> You have not revisited your estate plan in three to five years    |
| <input type="checkbox"/> Your children have achieved financial independence            | <input type="checkbox"/> You have moved to a new province or territory                     |
| <input type="checkbox"/> Your children have recently married, divorced or re-married   | <input type="checkbox"/> Your health status has changed                                    |
| <input type="checkbox"/> New federal and/or provincial laws have recently been created |  |

*If you checked any of the boxes above, it's a good time to update your plan.*

## If Cancer is Your Cause...

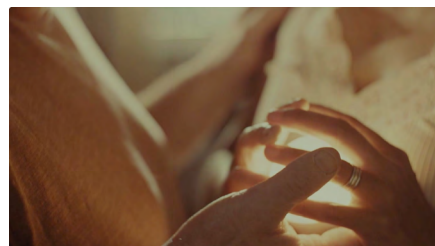
A gift in your Will to The Princess Margaret directly supports our top priorities in cancer care, research and treatment, including:



Funding high-priority research initiatives for over 200 types of cancer, including some of the most difficult to treat.



Enhancing our clinical spaces to ensure they continue to support the delivery of world-class care in state-of-the-art environments.



Supporting comprehensive care programs that extend wellness beyond physical care, incorporating emotional and mental health care for patients and their loved ones.

## Sample Language for Your Will

If you wish to include a gift in your Will to The Princess Margaret, please use the sample language below:

"I give to The Princess Margaret Cancer Foundation, 610 University Avenue, Toronto, Ontario, Charitable Registration number 88900 7597 RR0001, the [sum amount, percentage, etc.] to be used to support the Foundation and its mission for the benefit of Princess Margaret Cancer Centre."

If you wish to designate your gift for a specific purpose, we suggest adding a "Power to Vary" clause to honour your wishes. For example:

"If at the time of my death it is impossible, impractical or inadvisable to apply the gift to this purpose, the Foundation may at their discretion direct the gift to a similar purpose."

Whichever you choose, your gift will have a lasting impact on the lives of cancer patients everywhere.

## We're Here to Help

Thank you for considering building your legacy with The Princess Margaret. If there is anything we can do to assist you, please don't hesitate to get in touch.



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