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Foundation CONNECTION
Newsletter of the University of Ottawa Heart Institute Foundation

> ISSUE NO. 17 | SPRING 2019
For those of us in Ottawa, winter 2018/2019 will be one for the record books. In spite of these challenges, *February is Heart Month* was a spectacular success. Communities around the region braved the elements to fundraise in creative ways. Paper hearts were everywhere! Thank you to everyone that joined the activity, you truly gave with heart.

Throughout 2019, you will see a lot of changes as the renovations are underway in the original Heart Institute building. By the end of the year, patients will be welcomed at the all new Central Registration, and our state-of-the-art diagnostic equipment will be together, in one place, in the renovated Cardiac Imaging Centre. We are immensely grateful to generous donors who continue to support this journey – we are almost there!

In this spring-is-finally-here issue of *Foundation Connection*, you will find a small sample of the hundreds of holiday cards with greetings and good wishes that were sent to patients and staff. Thank you for your many thoughtful notes, they were appreciated.

If becoming more active was part of your New Year’s resolution, you will find tips to start heart healthy exercise in this issue. You can learn more about Nancy Hansen’s inspiring story about her gift of time (*No More Fear*), and we are proud to share recent community news about our Heart Institute family (Order of Ottawa Inductees). Don’t miss out on upcoming opportunities to challenge yourself and your heart health (Race Weekend and Team Heart), among other items we hope you will enjoy.

Thank you for your commitment to the Heart Institute; we are ever grateful for your support,

Jim Orban, President and CEO
Heart Institute Foundation
Thank you for your amazing messages! The patients and staff at the Heart Institute were deeply moved and appreciative that so many of you took the time to send words of encouragement and gratitude through our second annual Holiday Messages program. Here is a selection of some of the greetings we received this year.

Nurses and staff on H3, pleased to see so many thoughtful messages from our community.

To all the staff @ OH! Remarkably dedicated people who inspired, cared for and who, with their exemplary passion and compassion, helped me back from the brink of a near death experience of mystery and profundity. Your care will long be remembered!

To all who join at this great place - from the chiefs to the great minds of the projects. Good health!

To fill the kind doctor, nurses and others. May you have continually bless your work. And all patients and staff of Heart Institute.

The holidays are a time to reflect what we hold dear and give a helping hand to those in need. Wishing you joy, good health and rest! Thank you for helping.

HEART OF GOLD: Meet Arrhythmia Monitoring Centre Holter technologist, Sebastien Tranchemon-Tagne. Sebastien received a Heart of Gold pin in appreciation of his quick thinking when a visitor to the Heart Institute lost consciousness. Sebastien immediately began to perform lifesaving CPR while a Code Blue was initiated. Thank you for your quick thinking, Sebastien!

Sebastien Tranchemon-Tagne with Mary Sue Evans

THANK ONE. HELP MANY.

If you would like to acknowledge a health care professional, a volunteer or an entire unit who made a memorable difference in the care you received at the Heart Institute, consider making a donation to the Heart of Gold program. Your honouree(s) will receive a Heart of Gold pin accompanied by a card with your personal message. Heart of Gold pins are proudly worn as a reminder how important exceptional patient care is to everyone who comes to the Heart Institute.

All Heart of Gold donations will be matched by dedicated Heart Institute volunteers, Elva and Bill Holland. The matched donation means your gift will go twice as far supporting vital programs and saving lives.

You can make a Heart of Gold donation online at Foundation.ottawaheart.ca/gold or call us at 613.696.7030.
Almost all of Nancy Hansen’s life, she has been affected by heart disease.

Nancy lost her father to a genetic heart condition when he was just 59 years old. In the wake of his death, she discovered she had the same condition.

“I was quite young then, and I remember seeing an endocrinologist very quickly and being told to look after myself so I wouldn’t have issues in my 40s and 50s,” she says. As she aged, she focused on taking care of her health, concentrating on diet and exercise.

For decades, she was monitored and had annual stress tests through her cardiologist. “It was also a kind of wait-and-see approach, to see if I’d developed symptoms,” Nancy says.

A couple of years ago, she began noticing small chest pains but only when she was really pushing herself, like in kickboxing class.

Then in 2017, she began feeling not-so-subtle differences. “I used to ride my bike to work in the summer, and I’d be getting dizzy and also began noticing I had this feeling of being very full, like I’d eaten a big meal,” she says. “That feeling was so consistent that I couldn’t ignore it.”

She mentioned the issue to her cardiologist, who sent her for testing and an angiogram at the Heart Institute. The results came back: Nancy had three very small blockages and one more concerning blockage that would require a stent.

**FROM ONE TO FOUR**

Nancy’s stent procedure took place in January 2018.

“During the procedure, you’re very medicated but I was very aware of what was going on around me and narrating how I was feeling for them,” she recalls.

Nancy was scheduled to have one stent inserted. While the procedure was underway, she felt pain in her chest and arm.

“I began to feel something had changed,” she said. “The doctors and nurses were attentive, talking to me and asking how I was feeling, but they were calm and didn’t give me cause to be anxious. I realized the doctor was asking for more stents.”

In the end, Nancy’s procedure for a single stent, turned into the insertion of four stents to repair the damage to her heart.

“My doctor told me that my arteries had been splitting and tearing during the surgery,” says Nancy. “I remember being so stunned and thinking ‘What? How do your arteries do that?’”

**SNAPPING INTO ACTION**

While being transferred to her hospital room after the procedure, Nancy began having pains again.

“I was in the elevator and started feeling pressure down on my chest, and then it started into my arm, and I started to think ‘whatever happened to me on the table is happening to me now,’” she remembers. “I went from being fine in one heartbeat to having this awful chest pain. As soon as those elevator doors opened, I locked eyes with one of the nurses and told her something was wrong.”
Almost immediately, the nurses snapped into action.

“They put me on a bed and hooked me up to an ECG, put oxygen on me, gave me nitro spray, and were really attending to me,” says Nancy. “They never told me I was having a heart attack. But they knew I needed to get back down to the lab, stat.”

Within a half-hour of her first procedure, Nancy was back on the operating table—this time, for a fifth stent.

“Because they moved quickly during my heart attack, I would be able to have a full recovery and little to no damage to my heart, which was phenomenal,” she says.

When Nancy’s husband joined her, they had an emotional reunion.

“She also realized the impact of the nurses’ quick action.

“Because they moved quickly during my heart attack, I would be able to have a full recovery and little to no damage to my heart, which was phenomenal,” she says.

Nancy Hansen at the Heart Institute in 2018

AN EMOTIONAL REUNION

Nancy spent the night at the Institute after she received her final stent.

“All my thoughts kept going to my family and how fragile life can be,” she says. “I was trying to process everything that had happened. How did my arteries do what they did? What did it all mean?”

She also realized the impact of the nurses’ quick action.

“Because they moved quickly during my heart attack, I would be able to have a full recovery and little to no damage to my heart, which was phenomenal,” she says.

When Nancy’s husband joined her, they had an emotional reunion.

“He’d thought I was only going to get one stent, but because my arteries split, all the others were being put in to repair the tears,” says Nancy. “He didn’t even know at the time that I’d gone back into the lab for the fifth stent—there just wasn’t time for a doctor to inform him. He told me later that when a nurse said ‘the doctor would like to see you,’ he thought they were going to tell him I died. I didn’t realize that’s where his mind had gone.”

“We both broke down and cried.”

REHAB AND RECOVERY

Nancy was home the day after her procedure, back to work within two weeks, and took full advantage of the Heart Institute’s rehabilitation program.

She credits the Heart Institute for its many programs assisting in her rehabilitation.

“They offered so many services and so much support that they helped me focus on the things I could control, like diet and exercise,” she says. “I embraced everything they offered.”

One such service is provided virtually.

“I had a coach who would call me and we’d have biweekly meetings, and she stuck with me all the way through recovery,” she says.

She recalls one particular time her coach provided superb service.

“I’d begun exercising again and was starting to feel better. I knew I could exercise, as long as I didn’t raise my heart rate too much. So I told my

EQUIPMENT WISHLIST

- **Mobile Treatment Carts:** $1,000 each
  - House and store everyday supplies such as syringes, gauze, first aid components, protective equipment for clinicians, and emergency supplies that clinicians require in order to provide prompt, safe, and effective patient care.
coach I was lifting leg weights at the gym, and she said I wasn’t ready to do that. It’s funny because I didn’t even think lifting weights with my legs could hurt my heart.”

She was given strict instructions to lift no more than 10 pounds—and told it would be a long time before her five stents would heal in her heart.

“You don’t know what you don’t know,” Nancy says. “That blows me away the most—what if I hadn’t joined that rehab program? If I didn’t have that support, I could have seriously hurt myself. I’m so grateful for that program. And really, it’s more than just rehab—it’s recipes and resources, classes from dietitians, and access to social workers, and they’re right there any time you need them.”

Nancy also joined Women@Heart, a unique peer-to-peer support program offered through the Canadian Women’s Heart Health Centre at the Heart Institute.

“I’m normally a very shy person but I met the most amazing women who I connected with on this beautiful level. We met every other week for six months, and there was so much information provided...really, every woman that goes through heart problems should join this support group.”

**A NEW NORMAL**

Almost one year after receiving five stents, Nancy is doing well.

“I have a new normal, so I have to do things a bit differently,” she says. “I can only do mild to moderate exercising, so I do it at a lower pace for longer periods of time. Meanwhile, I feel strong.”

Nancy continues to do follow-up appointments.

“My doctors know of other blockages so if I start to feel changes, we’ll be on top of it,” she says. “That’s just amazing that you have this ongoing support many months after the fact. It’s a huge safety net, like you have your own team rallying around you and want you to be well.”

Meanwhile, Nancy is enjoying many of life’s milestones.

“There’s so much joy right now—my son got married last October and now he and his wife have welcomed a son, our first grandchild, and my daughter is getting married this June.”

“My gratitude to the Heart Institute is beyond words, for allowing me to enjoy these precious parts of life.”

Happy times for the Hansen Family

**FACING THE FUTURE WITH GRATITUDE**

Today, Nancy is looking toward the future with no fear.

“My son has the same genetic condition as my dad and me, but it’s so comforting to know that if ever he needs the Heart Institute, it’s there for him,” she says. For now, he is planning on taking medication to keep his condition at bay.

“The sooner we start, the longer you have before we’re doing things like discovering blockages and having stents.”

Meanwhile, Nancy has come to terms with the emotional side of her life-changing experience.

“I used to be afraid of this happening again, but what I don’t feel any more is afraid of having another blockage or heart attack. I have peace of mind because I know that the Heart Institute is the best place for taking care of me. And that’s a wonderful feeling.”
Here are 10 tips to help anyone safely start an exercise program.

1. GET YOUR HEART PUMPING FASTER EVERY DAY.
Work the large muscles in your arms and legs by walking, swimming or cycling.

2. WORK YOUR OTHER MUSCLES, TOO.
Strengthening your trunk, arms and legs improves your overall fitness.

3. WORK ON BALANCE.
Do something to challenge your balance every day, even standing on one leg in a safe place.

4. SOME EXERCISE IS BETTER THAN NO EXERCISE.
Sessions of at least 10 minutes are beneficial as you work towards 150 to 200 minutes per week.

5. SET A GOAL AND TRACK YOUR PROGRESS.
Set realistic goals and adjust them regularly.

6. WARM UP AND COOL DOWN.
Gently increase your intensity over the first 5-10 minutes and gradually slow down at the end.

7. MODERATE INTENSITY EXERCISE IS SAFE FOR MOST PEOPLE.
If you’re unsure or want to push a little harder, check with your healthcare provider.

8. LISTEN TO YOUR BODY.
Aim for a feeling of “moderate to somewhat difficult” rather than “easy” or “too difficult.” The “Talk Test” is a great guide: if you can sing while exercising, take it up a notch, if you can’t talk without pausing to breathe, back off a bit.

9. SIT LESS, MOVE MORE.
Moving often throughout the day will improve your overall health.

10. NEED MOTIVATION TO START?
Make a plan with a friend or join a group.

Looking for a place in your community to get started with exercise? Look for the Heart Wise Exercise logo which identifies a safe and appropriate setting for those concerned about joining a group.

www.heartwise.ottawaheart.ca

Always consult your doctor before starting any exercise program.
If you are from Ottawa, Monsignor Paul Baxter may be a familiar name to you. As a teacher and coach at St. Pius X and St. Paul High Schools, and as parish priest at St. Patrick’s Fallowfield, Monsignor Baxter made an undeniable impact on our community. This legacy carries on even now, more than 20 years after his death.

Monsignor Baxter’s motto, affixed to the wall of the Barrhaven elementary school bearing his name and familiar to all who knew him, was simple: “Try your best, be kind to others, keep the faith.” It is clear that Monsignor Baxter lived those words and was greatly admired for his compassion and commitment to help those around him become their best selves.

When Monsignor Baxter passed suddenly in 1998, people close to him, among them his former colleagues Joseph Mullaly, and Patrick Jennings, were inspired to find a way to carry on his legacy. In fact, it was at the Monsignor’s funeral that the idea first surfaced explains Patrick, “the seeds of a foundation in his honour were planted at his funeral that day. We knew we had to continue the good work he had started, because he wasn’t done.”

Soon, a meeting to explore the possibility of a foundation was called in the library of Saint Mother Teresa High School where more than 40 people showed up, eager to play a part in continuing Monsignor’s good work in the community. Joseph describes the meeting and the work that followed as a “grass roots movement that took off” and within a year, the Monsignor Paul Baxter Memorial Foundation was up and running, raising funds through various initiatives including a popular annual Dinner & Dance. That same year would’ve been Monsignor Baxter’s 40th year as a priest. “He was simple” explained Patrick, a close friend of the Monsignor, “his motto was ‘do your best’ and that’s what the foundation was built on.”

It was Monsignor Baxter’s sincerity that made him so special and drew people to him but it was his commitment to his students that really set him
“Monsignor Baxter as an educator was known to be tough but fair. He always had time for people and showed special concern for students that had been faced with some kind of adversity,” said Joseph. He not only influenced the lives of students but Sean Kelly, current MPB Foundation President, former student, and family friend of Monsignor Baxter said, “he was held in high esteem by staff and colleagues as well, which showed the incredible impact he had on many of us as a friend, and educator.” It made sense that a scholarship was created, funded by the MPB Foundation, and awarded annually to Ottawa catholic high school graduates who are selected based on their essay submissions describing how they were a worthy representative of Monsignor Baxter’s legacy.

During his life, Monsignor Paul Baxter supported the work of the University of Ottawa Heart Institute and so, beyond the scholarships, the MPB Foundation opted to make a very generous $30,000 donation to University of Ottawa Heart Institute Foundation in the spring of 2018, ensuring that his legacy will continue to be felt by cardiac patients in our community. Joseph explained, “before his passing he supported the Institute, as well as people he knew who were patients there. It was really his personal connection with the Institute that drove the Foundation to continue his support of the Heart Institute.”

Monsignor Paul Baxter’s legacy has carried on in many different ways and, thanks to the volunteer members of the MPB Foundation, each with their own connection to the Monsignor, it will continue to support the patient care, research and innovations, that will change the lives of so many in our community.

2018 Order of Ottawa Inductees

Four members of the University of Ottawa Heart Institute’s family were among 16 Ottawa residents inducted to the Order of Ottawa by Mayor Jim Watson. The ceremony was held Thursday, November 22, 2018 at City Hall.

Established in 2012 by Mayor Watson and City Council, the Order of Ottawa recognizes outstanding Ottawa residents who have made a significant contribution in a professional capacity in many areas of city life. Recipients were nominated by their peers and then chosen by a selection committee comprised of the Mayor, City Clerk and Solicitor, Chief of Police, Chief of Protocol, City Archivist and Chief Executive Officer of the Ottawa Public Library.

The Ottawa Heart Institute 2018 inductees are (left to right):

**David Rattray**, Member of the Board of Directors, University of Ottawa Heart Institute Foundation

**Barbara Farber**, Chair of the Board of Directors, University of Ottawa Heart Institute Foundation

**Graham Bird**, Elected Director, University of Ottawa Heart Institute Board of Directors

**Dr. Marc Ruel**, Division Head, Cardiac Surgery, University of Ottawa Heart Institute
"As a cardiologist and researcher, I am honoured to be the 2019 Heart Month Ambassador. The unwavering generosity of this community is amazing and we are deeply grateful for your support during Heart Month. Thank you, because of you, the Heart Institute will remain a special place for healing, caring and learning."

Dr. Rob Beanlands, Chief of Cardiology

HEART MONTH IN EASTERN ONTARIO AND THE OTTAWA VALLEY
Thank you to community event organizers, volunteers and participants.

Thank you to all February is Heart Month Sponsors!

COMMUNITY CHAMPIONS

Valecraft Homes Ltd
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COMMUNITY AMBASSADORS

DONELLY Automotive Group
Norton Rose Fulbright
Giant Tiger

COMMUNITY MATCH PARTNERS

Giovanni’s
Mercedes-Benz Ottawa Downtown
Anonymous Corporate Donor

CARLTON Refrigeration Heating Air Conditioning Ltd.
Thank You for #GivingWithHeart!
Record breaking $604,000 donated during February is Heart Month

Celebration Event at Bell Media
February 28, 2019

Dr. Wilbert Keon, Dr. Thais Coutinho, Dr. Rob Beanlands, Dr. Thierry Mesana and Jim Orban celebrate in appreciation of everyone who supported Heart Month. Thank You!

Photo captions from Heart Month:

1. Sacred Heart High School’s annual Toonies for your Ticker was a great success. Co-organizers Paddy Green (L) and Brayden Sterling (R) with Lynne Clark, Heart Institute Foundation.

2. The Eganville Legion, Branch 353, annual Ottawa Heart Institute Fundraising Dance with Comrade Reta Behm (L), and Comrade Walter Horden and special guest Dr. Wilbert Keon.

3. 2019 Heart Month Ambassador Dr. Rob Beanlands shows a little heart!

4. Shawville Annual Curling Bonspiel for the Heart Institute volunteer organizers Sonia Campbell (L) with Melba Powell and Heart Institute Foundation President and CEO Jim Orban.

5. Wellington West BIA Executive Director Dennis Van Staalduinen joined CTV Morning Live host Annette Goerner and Heart Institute Foundation’s Lindsay Firestone promoting Wellington West Heart Month activities.

6. Pitt Paquette, Marion Martell, and Bruce MacNaughton at the annual Vankleek Hill Curling Bonspiel in support of women’s heart health.

7. Bob Porter and Lynn Agnew, volunteers at the Cobden Civitan Club ice fishing derby.

8. This crowd in Pembroke at the Old Tyme Country Variety Show definitely has heart!

9. Dr. Joelle Zagury with Ollie and Mia.


11. Chris Troughton


13. Ricky Saikali, Samantha Li, Dalena Vu, Laura Cousineau and Jean-François Vachon.

14. Tom Foulkes.

15. Christine O’Grady, Holly Roberts and Josephine Cornish.

16. Leslie Mise, Aldo Chiappa and Graham Bird.

17. Lauren Cheresna.


19. Olivia Hiddema, Jacqueline Gorra, Michelle Nguyen and John Nguyen.

20. Larry Woermke and Patricia Woermke.


22. Anka Vukovic, Angie Cambareri and Antonella Ceglia.

23. Cindy and Kevin Lamoie

24. Lina El-Khoury.

The Gift That Keeps on Giving

It isn’t always easy to know when “friends” become “family.” For John Stevens and Pam Davis, they knew that “friends” just didn’t cover their special relationship.

“John and my dad were especially close, so we were like this weird little family,” says Pam.

In fact, they would spend most Thanksgivings and Christmases together with Pam’s parents and John’s son Matthew.

In the early 1990s, John casually shared with Pam that he was feeling heart palpitations. John wasn’t particularly concerned but Pam, a former Heart Institute nurse, felt it was important for John to look into his symptoms. Pam’s intuition wasn’t just sparked by her career as a cardiac nurse but from a personal place as well. Pam had already seen the Heart Institute help one family member; her father, who received bypass surgery in the 1980s.

“John was saying he’d had palpitations off and on and he’d get short of breath sometimes,” Pam shared. Thinking it could be arrhythmia, Pam recommended John go to the Heart Institute for testing.

Nobody was expecting what came next.

A SHOCKING DISCOVERY

John underwent several diagnostics tests at the Heart Institute, including x-rays and bloodwork, that not only confirmed John’s arrhythmia but discovered he had stage 4 lung cancer.

The next few years involved a biopsy, chemotherapy, and radiation, all the while treating John’s heart condition. He eventually went into remission from the cancer but, five years later, he had a heart attack.

“His lung issues had been looked after, but then here he was, back at the Heart Institute for bypass surgery,” recalls Pam. Fortunately, the surgery was successful, and John recovered at Pam’s parents’ home with his “weird little family” by his side to support him.

LEAVING A LEGACY

Christmas of 2009 and much of 2010 brought sad times to Pam and John’s family. Pam lost her father to a heart attack on Christmas Day 2009 and, 15 years after first being diagnosed, John’s cancer returned and he passed away in June, 2010.

In his will, John left a legacy for a number of charities that had been important to him and to his family. “I remember Matthew saying ‘You know, the Heart Institute was really close to my dad’s heart,’—pun intended!,” Pam shared.
Before John passed, he asked Pam to act as the executor of his will. He trusted her to handle the details of his estate, of taking care to realize his final wishes. After he passed, Pam worked hard to ensure not only that John’s legacy would have an impact but that it also reflected what was important to him when he was alive and who he was as a person. Because John felt so strongly about the Heart Institute’s impact on his life and the gift of time he enjoyed as a result, John’s legacy included a gift to the University of Ottawa Heart Institute.

“The Heart Institute not only fixed his arrhythmia for the rest of his days but helped save his life. And I think he realized that if it hadn’t been for the Heart Institute, he wouldn’t have found out about his cancer, and he wouldn’t have had those extra 15 years of life.”

THE LEGACY CONTINUES

In 2017, Pam received an unexpected call from her bank.

John, a former Nortel employee, was entitled posthumously to a payout from what would have been his pension. Driven by her commitment to honour her friend’s wishes, Pam re-opened John’s estate and provided a second gift in support of the Heart Institute.

“I thought I was done, and he keeps coming back to haunt me!” Pam joked. “I feel like there must have been a reason for it - an opportunity to do something good.”

HEART INSTITUTE THEN AND NOW

After several years working for the Heart Institute, Pam moved to the corporate world and redirected her focus to workplace and occupational health and safety.

Still, when she visited the Heart Institute with John she saw familiar and friendly faces, 30-plus years later.

“A number of the people I worked with carried on there, so it’s been pretty nostalgic to go back,” she says. “It’s changed a lot since I worked there—it’s really amazing how the place has evolved.”

She references the hospital’s use of technology in advancing patient care.

“They’re always doing new and inventive things, like offering telehealth instead of having patients come in for appointments,” she says. “I just think that’s wonderful—the Heart Institute does amazing, amazing work. And I know John would have felt the same way if he were here today.”

During her time on staff, and since, Pam can point to a number of innovations that have advanced cardiac care: new equipment, non-invasive procedures, research, and programs like Telehealth, the Canadian Women’s Heart Health Centre, and Prevention and Wellness.

“Put simply, the Heart Institute saves lives, and allows you to have those people in your life a little longer. My dad was able to live many years after his bypass surgery. And John lived 15 more years and got to see his son grow up and graduate from university. That wouldn’t have happened without the Heart Institute.”

SHAPING HER OWN LEGACY

Motivated by her own experiences with the Heart Institute, the knowledge of the kind of long
term impact a legacy gift can have, and having been entrusted with John’s estate has led Pam to consider her own choices when she passes – shaping her legacy.

“I have no children, although I have great-nieces and -nephews, so I want them to have something,” she says. “But most of them will have finished university by the time I leave, and they all have parents who will include them in their wills.”

“So really, including family in my will may help them out a little bit, but it won’t make as much of an impact as a gift to others in a philanthropic way,” she adds.

“To me, that’s what life is. You want to leave your legacy. And even if nobody ever knows your name, you’re leaving something for the next generation.”

Pam also emphasizes the importance of having a will.

“When my mom was diagnosed with dementia, she didn’t have a will or power of attorney or power of care, which made for a very painful process,” she says. “Many people think they’ll be able to make decisions for themselves up until the day they die but for some, that doesn’t happen. It’s just not the norm. It’s important to set things up so you or the people closest to you have a say when you die.”

According to the Angus Reid Institute, in 2018 fewer than 51% of Canadians had a will and only 36% had a current, up to date will. A will shapes your legacy. Not only does a will provide clear direction for your loved ones, it ensures that your vision for the future and the welfare of your loved ones and the causes that matter to you can be realized.

To learn more about leaving a legacy gift in your will to the University of Ottawa Heart Institute, please contact the Legacy Gifts team at 613-696-7251 or wjklegacysociety@ottawaheart.ca.
Legacy Giving

GIFTS OF REGISTERED ACCOUNTS (TFSA, RRSP AND RRIF)

LaBarge Weinstein LLP - A Business Law Firm

When planning to make a gift to the University of Ottawa Heart Institute Foundation as part of an estate plan, consider designating the Foundation as a beneficiary of a Registered Account. Registered Accounts include: tax-free savings account (“TFSA”), registered retirement savings plan (“RRSP”) or registered retirement income fund (“RRIF”).

A holder of a Registered Account can designate the Foundation as a beneficiary of the entire amount of the TFSA/RRSP/RRIF, or alternatively they can include the Foundation as one of several beneficiaries, specifying the amount or portion of the Registered Account payable to the Foundation on their passing.

By designating the Foundation as a beneficiary, a donor can maintain full use of their Registered Accounts during their lifetime, but can be assured that any amounts that remain on their passing will transfer (as per their wishes, either in part or wholly) to the Foundation. This can often result in a sizable donation that the donor may not otherwise have been able to make during their lifetime.

Designating the Foundation as a beneficiary of Registered Accounts can provide a number of tax benefits to the donor’s estate. Payments from a Registered Account to a designated beneficiary generally pass outside of a will, which can reduce estate administration tax (commonly referred to as probate fees) and executor fees, which are calculated on the value of the assets in the will. Further, the designated bequest is a charitable gift and the tax credit generated by the donation of the Registered Accounts can be used to offset the deceased’s tax or, under proposed tax legislation, the tax of the estate.

For tax purposes, the full amount of the RRSP or RRIF would generally be added to the taxable income of the deceased in the year of their passing, and income tax would be payable on that amount. The amount of any TFSA on the date of passing would not be taxable, but any income earned after the date of passing would be added to the taxable income of the estate. The charitable tax credit generated by the gift should eliminate most, if not all, of the tax payable on the inclusion of the Registered Accounts, however, donors should consult their own tax advisors to determine the tax consequences in their personal situations.

If you have questions or require further information, please contact Selva Trebert-Sharman at 613-696-7251 or strebert@ottawaheart.ca. All conversations will be kept confidential. Your lawyer is also an excellent and valuable resource with whom to discuss the various gifting options and assist you with drafting an appropriate will.

Note: The above is for information only.
You Have The Power Now To Save A Life Later

LaBarge Weinstein LLP - A Business Law Firm

Every year Canadians pass away without a will and provincial laws determine how their assets will be distributed. According to a survey by the Angus Reid Institute, in 2018 fewer than 51% of Canadians had a will and only 36% had a current, up to date, will. A will shapes your legacy. Not only does a will provide clear direction for your loved ones, it ensures that your vision for the future and the welfare of your loved ones and the causes that matter to you can be realized.

If you have assets, young children, loved ones, or a cause that you care greatly about, you need a will. Through your will you name your children’s guardian, your beneficiaries, you identify who will oversee the distribution of your estate and you can express how you wish to support your favorite charities.

It’s important to know that, for tax purposes, when a person passes away they are treated as if they sold all of their assets for fair market value. Meaning, those shares in Company A purchased twenty years ago for $100, and with a current value of $1000, will result in a capital gain of $900 to be reported on your final tax return. Owning significant assets (either in value or number), which have increased in value during your lifetime, could mean a substantial tax bill at the time of your passing.

As in life, charitable donations made through a will lead to a tax credit that can, in most circumstances, be used to reduce the tax payable on a final return. This presents an opportunity to support charities, like the University of Ottawa Heart Institute Foundation, by including a gift in your will while reducing your estate’s tax bill.

There is both a federal credit and a provincial credit for making a charitable donation, and the credit can be used to directly reduce taxes otherwise payable in your final return. The credit is calculated as follows:

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<thead>
<tr>
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<th>First $200 in Charitable Donations</th>
<th>Charitable Donations over $200</th>
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<tbody>
<tr>
<td><strong>Federal</strong></td>
<td>15%</td>
<td>29-33%</td>
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<tr>
<td><strong>Ontario</strong></td>
<td>5.05%</td>
<td>11.16%</td>
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What does this mean for your final tax return? Assume that you made a charitable donation of $20,000 in your will, and you were a resident of Ontario at the time of your passing. Your estate would be entitled to a combined federal and provincial tax credit of approximately $7,992 to reduce any tax otherwise payable. By including a charitable gift in your will you reduce your estate’s overall tax payable and have the

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EQUIPMENT WISHLIST

Critical Care Patient Beds:
$35,000 each

Critical care beds that are specialized for use by cardiology and cardiac surgery patients and are vital in patient care and recovery of the compromised patients.
satisfaction of knowing that your money will go to support a cause you believe in.

There are several ways to include a charitable gift in your estate plans, including:

• gift a specific amount
• gift a specific percentage of your estate
• designate the Heart Institute as the beneficiary of an insurance policy
• gift shares

This article has focused on gifts of specific amounts or a percentage of your estate. We are here to help. If you have any questions or require further information about the different ways you can include a gift to the University of Ottawa Heart Institute in your will, please contact Selva Trebert-Sharman at 613-696-7251 or strebert@ottawaheart.ca. All conversations are confidential. Your lawyer is also an excellent and valuable resource with whom to discuss the various gifting options and assist you with drafting an appropriate will.

Editors Note: In 2018, the Heart Institute received gifts of $1,000 to $200,000. Each and every gift makes a big difference to our patients and their families, and we cannot express how grateful we are to those generous individuals who chose to include a gift to the Heart Institute in their will.

In 2018, Leaders at Heart 2020 came together and challenged themselves to raise $500,000 to purchase specialized equipment for the new Critical Care Tower. Many thoughtful donations were inspired by Leaders 2020, and, in Cornwall/Stormont Dundas Glengarry, under the leadership of Dr. Paul DeYoung, along with Ed Lumley and Tom Kaneb, their local campaign raised over $1,250,000 bringing the Leaders at Heart 2020 fundraising grand total to $1,501,498!

LEADERS AT HEART 2020

Thank you to our Leaders at Heart 2020 who were unable to join us at our celebration event:

Greg Roscoe, Doug Assaly, Colin Aubry, Dr. Paul De Young, Steve Gallant, Lindsay Hockey, Alfred Jay, Joanne Kudakiewicz, Gavin Leishman, Peter MacTavish, Valerie Marcil, Chris McBean, Deanna Monahan, Blair Patacairk, Deneen Perrin, Jim Reklitis, Jason Shinder, Nathan Smith, Robert Taylor, Milan Topolovec, Peter Van Roon, John Westbrook
Register for any Race Weekend event by visiting www.runottawa.ca and completing the Scotiabank Charity Challenge component. Here you can choose to support the Heart Institute with your registration and, if you choose to, you can create a personal fundraising page to encourage your friends and family to do the same.

Once you have chosen to support the Heart Institute, you will have access to race-related perks including a Team Heart t-shirt.

**Plus:** To encourage and support those who may be intimidated and as a special incentive, the Heart Institute’s Heart Wise exercise group invites you to be part of a team of participants who want a little extra support or company during training and at the event.

Contact Lindsay Firestone at 613-696-7261 or lfirestone@ottawaheart.ca to receive more information about Race Weekend, the Heart Wise team, and much more!

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**SUBARU IRONMAN 70.3, 5150 & SPRINT**

Mont Tremblant ❤ June 22-23, 2019

Have you ever wanted to take on the challenge of training for and completing an Ironman 70.3 triathlon? Are you a seasoned triathlete looking for a new challenge? Would you like to be part of the amazing Team Heart at the Ironman 70.3 Mont-Tremblant course?

Join us for Team Heart Powered by BMO, part of the Subaru Ironman 70.3 Mont-Tremblant presented by Sportium June 21-23, 2019!

As a member of Team Heart powered by BMO, you will train with professional triathlon coach Rick Hellard and Ironman Athlete Tony O’Keeffe. While you prepare for the ultimate physical challenge with the support of a team that understands and shares your personal and physical goals, you will also be encouraging your friends and family to support your journey by making a donation to the University of Ottawa Heart Institute on your behalf.

**This event is sold-out! Good News! Team Heart has a few spots available.**

**Contact us today to join Team Heart.**

Visit www.teamheartottawa.com or contact Lindsay Firestone at 613-696-7261 or lfirestone@ottawaheart.ca.

*Note: A deposit is required to secure your registration. Your deposit will be refunded once you have reached the minimum fundraising goal.*
### Upcoming Events

#### FUNDRAISING IN OUR COMMUNITY IN 2019

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 26 &amp; 27</td>
<td>24 HOURS OF GOLF</td>
<td><a href="http://www.24hoursofgolf.ca">www.24hoursofgolf.ca</a></td>
</tr>
<tr>
<td>May 4</td>
<td>UNMASKING PH MASQUERADE BALL Pulmonary Hypertension</td>
<td><a href="http://www.facebook.com/events/421844848554267/?ti=cl">www.facebook.com/events/421844848554267/?ti=cl</a></td>
</tr>
<tr>
<td>May 5</td>
<td>RUSSELL CHILDREN’S BALLET SCHOOL</td>
<td><a href="http://www.russellchildrensballetschool.com/">www.russellchildrensballetschool.com/</a></td>
</tr>
<tr>
<td>May 5</td>
<td>MANOTICK MILER</td>
<td>manotickmiler.com</td>
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<tr>
<td>May 11</td>
<td>OSGOODE CARLETON SNOWMOBILE CLUB FISHING DERBY</td>
<td>ocstc.ca/</td>
</tr>
<tr>
<td>May 30</td>
<td>GOLD PLATE DINNER</td>
<td>goldplatedinner.com/</td>
</tr>
<tr>
<td>May 31</td>
<td>RHYTHM AND RED DANCE &amp; DINE</td>
<td><a href="mailto:navirak92@hotmail.com">navirak92@hotmail.com</a> or 613.841.7688</td>
</tr>
<tr>
<td>June 6</td>
<td>ASSOCIAZIONE EMILIANA DI OTTAWA GOLF TOURNAMENT</td>
<td><a href="mailto:emilianiottawa@gmail.com">emilianiottawa@gmail.com</a></td>
</tr>
<tr>
<td>June 8</td>
<td>RAISING MOUNTAINS FOR PULMONARY HYPERTENSION</td>
<td>donate.ottawaheart.ca/goto/malette</td>
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<tr>
<td>June 21</td>
<td>DMAC DANGLER</td>
<td><a href="http://www.dmacdangler.ca">www.dmacdangler.ca</a></td>
</tr>
<tr>
<td>June 22</td>
<td>8TH ANNUAL TYLER KERR MEMORIAL GOLF TOURNAMENT</td>
<td><a href="http://www.facebook.com/tkmemorialgolf/">www.facebook.com/tkmemorialgolf/</a></td>
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<tr>
<td>June 23</td>
<td>MEAT AND GREASE AT DERAND MOTORSPORT</td>
<td>meatandgreaseottaw.wixsite.com/</td>
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<td>meatandgreaseottawa</td>
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<tr>
<td>July 6</td>
<td>MEECH LAKE TRIATHLON</td>
<td><a href="http://www.meechlaketri.ca/">www.meechlaketri.ca/</a></td>
</tr>
<tr>
<td>August 9</td>
<td>KNIGHTS OF COLUMBUS 485 GOLF</td>
<td><a href="http://www.koc485golf.ca/">www.koc485golf.ca/</a></td>
</tr>
<tr>
<td>August</td>
<td>DEWAAN FOUNDATION 19TH ANNUAL GOLF TOURNAMENT</td>
<td>dewaanfoundation.org/</td>
</tr>
<tr>
<td>August 17</td>
<td>3K WALK &amp; BBQ IN MEMORY OF MARK PELLETIER</td>
<td><a href="http://www.fromtheheart3kmwalk.wixsite.com/info">www.fromtheheart3kmwalk.wixsite.com/info</a></td>
</tr>
<tr>
<td>Late summer</td>
<td>ATKINSON’S SPORTS BAR GOLF FOR THE HEART INSTITUTE</td>
<td>September Hamilton, (819) 647-2526</td>
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</table>
THANK YOU! The Smiths Falls Rotary Club's recent pledge of $25,000 will purchase much needed, life saving equipment for the new Critical Care Tower. The ability to purchase this specialized equipment relies on the generosity of donors and support of community activities, like the bingo program at the Smiths Falls Rotary Club. We couldn’t do it without you!