

INCLUDING THE HEART INSTITUTE IN YOUR ESTATE PLANS



UNIVERSITY OF OTTAWA
HEART INSTITUTE
INSTITUT DE CARDIOLOGIE
DE L'UNIVERSITÉ D'OTTAWA

FOUNDATION
FONDATION

Information Donors may find useful in the administrative process of including a gift to the Heart Institute in their will.

THE LEGAL NAME OF THE HEART INSTITUTE FOUNDATION:

University of Ottawa Heart Institute Foundation

THE HEART INSTITUTE'S REGISTERED CHARITY NUMBER:

140813452RR0001

SAMPLE CLAUSES FOR WILLS:

A bequest gift may consist of cash, publicly listed securities, proceeds of life insurance policies and retirement funds. Other property may also be donated subject to evaluation and approval by the University of Ottawa Heart Institute Foundation.

The following clauses are for reference purposes and may be amended as the Donor feels appropriate.

UNRESTRICTED BEQUEST:

An unrestricted bequest gift allows the Heart Institute to use the gift to address the Heart Institute's priorities and most urgent needs.

"I give to the University of Ottawa Heart Institute Foundation (the sum of \$_____, or a portion of my estate, or the whole or a portion of the residue of my estate, or other property) to be used for priorities of the University of Ottawa Heart Institute to be allocated at the discretion of the Board of Directors of the University of Ottawa Heart Institute Foundation."

For more information, please contact:

Selva Trebert-Sharman | Manager, Legacy Gifts | Heart Institute Foundation

40 Ruskin Street, Ottawa, Ontario, K1Y 4W7 | 613-696-7251 | strebert@ottawaheart.ca | donate@ottawaheart.ca



RESTRICTED BEQUEST:

The bequest gift can be directed towards a particular area as identified by the donor.

“I give to the University of Ottawa Heart Institute Foundation (*the sum of \$____, or a portion of my estate, or the whole or a portion of the residue of my estate, or other property*) **to be used for** (*description of the designated area*).”

POWER TO VARY PROVISION FOR RESTRICTED GIFTS:

For restricted gifts, since a number of years may pass before the contribution is received by the Heart Institute; it is recommended that the following clause be included in the event that the funds cannot be applied for the intended purpose(s) as originally directed by the Donor.

“If, in the opinion of the Board of Directors of the University of Ottawa Heart Institute Foundation, it should become impossible, inadvisable, or impractical to use this gift for the specified purpose(s), then the Board may in their discretion use the gift to the best advantage of the University of Ottawa Heart Institute, keeping in mind the original wishes of [Donor’s name].”

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