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Ericka Tovey, CFRE | Senior Director, Philanthropy | 416.864.5246 | toveye@smh.ca

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For more information contact:
Laura Rumble, Manager, Estate Giving
416-340-4800 x6695 | laura.rumble@uhn.ca
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MAKE THE ROM YOUR LEGACY.

TODAY'S DATE: May 16

Where There's a Will: Avoid Estate Planning Mistakes
Thursday, May 16 – 1:30 - 3:00 PM
Matthew Urback, Partner, Shibley Righton LLP
Jacqueline Cooper, VP, Development, West Park Healthcare Centre Foundation

Tax Smart Estate Planning & Giving
Thursday, August 8 – 6:00 - 7:30 PM
Alan Madonik, Wealth & Health Broker, Blue Swan Financial
Subhasit Kharag, CFP, Regional Vice President, Ontario, Foresters Financial
Bri Trypuc, Founder, Trypuc Philanthropic Office

Choosing the Right Executor
Thursday, September 5 – 1:30 - 3:00 PM
Elaine Frost, President & Founder, Trusted Transitions

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Abdesh Furmah (416) 586-5530 • leavealegacy@cagptoronto.org • www.cagptoronto.org/legacy
Where There’s a Will: Avoid Estate Planning Mistakes
Thursday, May 16 – 1:30 PM to 3:00 PM, Toronto Reference Library, 789 Yonge Street
Matthew Urback, Partner, Shibley Righton LLP
Jacqueline Cooper, MA, Vice President, Development, West Park Healthcare Centre Foundation
Don’t have a will? You are not alone! What happens to your family if you die without a will or if it’s outdated? Understand how you can protect your assets while reducing or avoiding conflict amongst family. In addition to tax benefits, discover other important reasons to leaving a lasting legacy to your favourite charity.

Who Needs a Will?: Why Estate Planning is Critical
Thursday, June 13 – 1:30 PM to 3:00 PM, Locke Library, 3083 Yonge Street
Jag Gandhi, Partner, Miller Thomson LLP
Janice Correa, Associate Vice President, Legacy Gifts, ROM Governors
Many of us don’t realize how much wealth we’ve accumulated, from RRSPs, RIFs, real estate, stocks, bonds and other assets. Our speakers will show you the importance of making a Will and strategies to protect your wealth. You will learn how to ensure your wishes are executed, from providing for your loved ones to making a charitable gift to the causes you care about. You will also learn about real life cases of improperly drawn wills that cost the estates time and money, as well as lost or reduced legacy to beneficiaries.

Estate, Succession and Legacy
Wednesday, June 19 – 6:00 PM to 8:00 PM, Scarborough Health Network, Birchmount Hospital, 3030 Birchmount Rd.
Lydia Cheung, CFP, PFP, RRC, Financial Consultant, IG Wealth Management
David Dai, CFP, HRC, Financial Consultant, IG Wealth Management
Edith YT Leung, CPA, CA, CPP, Partner, Leung Luo Pang LLP
Rosetta Ting, Lawyer, DS Lawyers Canada LLP
Our panel of professionals will speak about estate planning strategies, the general quantitative and qualitative aspects of estate, succession and legacy. The panel will discuss Wills and Powers of Attorney, including information on “probate”. Information regarding taxes on death will also be discussed. This session will be presented in Cantonese.

Women’s Wisdom: Wealth and Philanthropy
Monday, June 24 – 3:30 PM to 5:00 PM, Royal Ontario Museum, 100 Queen’s Park
Sharon Avery, President & CEO, Toronto Foundation
Robin Turack, VP, Business Development, PearTree Canada
Brenda Lee-Kennedy, Partner, PricewaterhouseCoopers LLP
Moderator: Susan Horvath, President & CEO, ROM Governors
The panel will share pertinent insights on women’s wisdom in the context of wealth and estate planning. They will discuss valuable tools, action items and practical steps to help empower women strive for financial stability, avoid common estate planning mistakes and cover effective ways women can maximize their wealth and impact while supporting their philanthropic objectives.

Tax Smart Estate Planning & Giving
Thursday, August 8 – 6:00 PM to 7:30 PM, Toronto Reference Library, 789 Yonge Street
Allan Madonik, Wealth & Health Broker, Blue Swan Financial
Subhastin Kharag, CFP, Regional Vice President, Ontario, Foresters Financial
Bri Trypuc, Founder, Trypuc Philanthropic Office
If you could only pick two beneficiaries from three options which would you pick? Your family. Government. Charity? Join three professionals who will cover planning considerations to maximize and preserve your wealth as well as point out the advantages of charitable giving. This workshop will be interactive and provide you with the knowledge to make intelligent decisions for your business partners or family members.

Choosing the Right Executor
Thursday, Sept 5 – 1:30 PM to 3:00 PM, Toronto Reference Library, 789 Yonge Street
Elaine Frost, President & Founder, Trusted Transitions
How do you choose an executor for your estate? What do you need to know or ask? This session will cover what an executor does, a checklist for choosing the right executor for your estate and what you can do if you don’t have an executor.

Planning for the Single, Divorced & Widowed
Thursday, October 3 – 1:30 PM to 3:00 PM, North York Central Library, 5120 Yonge Street
Amanda Stacey, Partner, Norton Rose Fulbright Canada LLP
Meredith Meads, CFRE, Associate Director, Major Gifts & Gift Planning, Trinity College
What happens to your estate when you are single or widowed and die without a Will? What do you need to consider when you choose your Powers of Attorney and Estate Trustees? Learn about common estate planning mistakes and why planning when you are single, divorced, widowed, or have no beneficiaries, is equally vital than for those who are married.
**LEAVE A LEGACY™** is a national public awareness campaign designed to promote charitable giving by encouraging individuals to make a gift by Will, or other estate gift, to their favourite charity. LEAVE A LEGACY™ educational programs help to raise awareness on the importance of including a charitable gift in the estate planning process. LEAVE A LEGACY™ is a program of the Canadian Association of Gift Planners - L’Association canadienne des professionnels en dons planifiés (CAGP-ACPDP™).

**Canadian Association of Gift Planners**

The purpose of the Canadian Association of Gift Planners (CAGP) is to support philanthropy by fostering the development and growth of gift planning. The Association creates awareness, provides education and is an advocate of charitable giving, bringing together professionals from various disciplines to ensure that the gift planning process achieves a fair and proper balance between the interests of donors, and the aims and objectives of registered charitable organizations in Canada in accordance with the CAGP-ACPDP™.

CAGP Chapters operate in every region and most major cities in Canada to meet the needs and support the objectives of local gift planning professionals and donors. The Greater Toronto Area Chapter is a committee of CAGP, and serves as the primary vehicle for delivery of CAGP programs and materials to its members in the GTA. The GTA Chapter accepts, observes and promotes CAGP’s Standards of Professional and Ethical Practices.

**Leave A Legacy™ Committee Members 2019**

**Janice Correa (Chair)**  
Associate Vice President, Legacy Gifts  
ROM Governors  
janice.correa@rom.on.ca  
416.586.5578

**Verna Chen (Vice Chair)**  
Director, Stewardship & Legacy Giving  
ScARBorough Health Network Foundation  
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**Cynthia Collantes**  
Founding Member, CAGP

**Liza Fernandes**  
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**Angus Gordon**  
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**Serena Hak**  
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The Donor Motivation Program* Canada Associate  
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**Abdesh Furmah**  
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**Alice Wu**  
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ROM Governors  
awu@rom.on.ca  
416.586.5885

**James Corley**  
Director, Capital Campaigns  
UNIVERSITY OF TORONTO  
416.828.3737 x2240

**Sharon Avery**  
President & CEO of Toronto Foundation, one of Canada’s leading community foundations and a Toronto city-building institution. Ms. Avery has built a 19-year career as a high energy fundraiser and passionate communicator.

Prior to joining the Foundation in September, 2016, she served for eight years as Chief Development Officer at UNICEF Canada where she more than doubled its investment in children, transforming the organization on the international stage. There, Sharon led a pivotal fundraising campaign recruiting women philanthropists across Canada to embark on a four-year educational journey on maternal, newborn and child health in the developing world. In just 13 months $12 million was raised to support 3.8 million women and children in Peru, Namibia, Ethiopia, Cambodia and Indonesia.

Prior to UNICEF Sharon Avery held senior roles at SickKids Foundation, Save the Children Canada and Tim Hortons Children’s Foundation.

Sharon is known for her entrepreneurial spirit, critical thinking and collaborative leadership. She is a dynamic public speaker on a mission to bring philanthropy to the task of building a more resilient Toronto.

**Lydia Cheung, CFP, PFP, RRC, Financial Consultant, IG Wealth Management**  
T: 905 886-3850 Ext. 6233  
E: lydia.cheung@investorsgroup.com

Lydia attained the Certified Financial Planner (CFP) designation through licensing by the Financial Planners Standards Council. She also attained the designation of Personal Financial Planner (PFP) through The Canadian Securities Institute, Registered Retirement Consultant (RRC) through The Canadian Institute of Financial Planning.

Prior to joining IG Wealth Management in 2003, Lydia worked in a major Canadian bank for 15 years in various areas related to financial planning such as providing personal and commercial mortgages, loans and investment advice to professional individuals and small business owners. Lydia earned her multiple Pillar Awards® from IG and she became a successful field trainer in 2009.

With Lydia’s 30 years of experience and education in the financial industry, she brings a wealth of knowledge, professionalism and ethical standards to the table. Lydia is an enthusiastic, high energy individual that strives to educate clients in various areas of financial planning, including Tax Planning, Portfolio and Investment Management, Retirement Planning and Estate Planning and Preservation. She guarantees a complete and thorough analysis and reporting of your current financial position and a written comprehensive strategic plan in each area of financial planning based on your financial and personal goals.

Giving back to the community is a very important aspect of Lydia’s life. She is currently volunteering on the Board of Directors and Treasurer of a faith ministry in Ontario. She has volunteered in various local children and youth programs, provincially in indigenous communities and overseas in Ghana, West Africa.

**Jacqueline Cooper, VP, Development, West Park Healthcare Centre Foundation**  
T: 416 243-3613  
E: jackie.cooper@westpark.org

Jacqueline Cooper is an accomplished fundraising professional with 20 years of experience in the healthcare and education sectors and currently serves as Vice President, Development for West Park Healthcare Centre Foundation.

Jacqueline began her development career with KCI Philanthropy building her expertise in capital campaigns and received the President’s Circle Award from KCI in recognition of her achievements. Jacqueline later transitioned to the charitable sector and held leadership roles with Sinai Health Foundation, York University and St. Joseph’s Health Centre Foundation. Jacqueline found her passion for legacy giving early in her development career and following the passing of her mother.

Prior to her career in development, Jacqueline specialized in government relations working for the Ontario Medical Association and the Government of Ontario.

Jacqueline is committed to giving back through her volunteer work. She currently serves as Co-Chair of the Canadian Association of Gift Planners (CAGP) GTA Education Committee and is a member of the CAGP GTA Executive Committee.

Jacqueline has also been an active member of the Havergal College community where she served for 10 years on a variety of fundraising committees and was a member of the Directorate for the Havergal Old Girls Association.

Jacqueline holds a Master of Arts in Political Science from the University of Toronto.

**The Speakers**

**Sharon Avery, President & CEO, Toronto Foundation**  
T: 416 921-2035  
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Twitter: @s2avery

**Lydia Cheung, CFP, PFP, RRC, Financial Consultant, IG Wealth Management**  
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**Jacqueline Cooper, VP, Development, West Park Healthcare Centre Foundation**  
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**About Leave a Legacy**

Your Guide to Charitable Giving and Estate Planning
Elaine Frost, President and Founder, Trusted Transitions

Elaine Frost is President and Founder of Trusted Transitions. Elaine’s background includes an MBA from The Richard Ivey School of Business and a 15-year career in management with IBM Canada. She was also the CFO of Lexmark Canada, and ran her own Management Consulting practice for over 10 years. Elaine has also been a mentor to entrepreneurs and program instructor at Step Ahead, and has served on the Board of Habitat Services. She has been on the Board of Furniture Bank, and is a volunteer with the Canadian Diabetes Association. Elaine was a Certified Professional Consultant on Aging (CPCA), and degrees from Florida International University and Karachi University prior to working as a marketing executive for publishing firms from Europe, Japan and Latin America.

A strong advocate for volunteerism, she has been actively involved with the Canadian Association of Gift Planners (CAGP) for 15 years and currently serves as Chair, CAGP Leave A Legacy Committee and on the CAGP GTA Executive body. A member of the Association of Fundraising Professionals she was also a Mentor for the inaugural AFP Fellowship in Inclusion and Philanthropy Initiative.

Speaking Thursday, June 13, 1:30 - 3:00 PM
Locke Library

David Dai, CFP, RRC, Financial Consultant, IG Wealth Management

David has over 14 years experience in financial services, having worked in the banking industry and IG Wealth Management. David completed the Professional Financial Planning course and holds the designations of Certified Financial Planner.

Speaking Wednesday, June 19, 6:00 - 8:00 PM
Scarborough Health Network, Birchmount Hospital

Subhastin Kharag, CFP, Regional Vice President, Ontario, Foresters Financial

Subhastin works with Foresters Financial in Canada with a regional focus in Ontario, an Insurance & Financial Services organization with a difference. Impact is fundamental core motivator for Subhastin who has worked with thousands of advisors making an impact in their communities.

He grew up in York Region and is the father of three children whose insatiable thirst for life experiences inspires him, even though he fears flying. The highlight of his week is weekend family dinners, as it allows the sous chef & dishwasher expert to come to life.

Subhastin’s experience running his own practice since 2002 helps to bring expertise, creativity & ideas to the advisory space which he encourages. Building synergies in a collaborative environment is what best describes his way of working with advisors in taking advantage of these opportunities.

His inspiration for never having to work another day comes from the firms & advisors he is fortunate to work with, because their impact is often not realized for decades but they continue to do it each and every day.

Speaking Thursday, August 8, 6:00 PM – 7:30 PM
Toronto Reference Library

Elaine has also been a mentor to entrepreneurs and program instructor at Step Ahead, and has served on the Board of Habitat Services. She has been on the Board of Furniture Bank, and is a volunteer with the Canadian Diabetes Association. Elaine was a Certified Professional Consultant on Aging (CPCA), and degrees from Florida International University and Karachi University prior to working as a marketing executive for publishing firms from Europe, Japan and Latin America.

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Speaking Thursday, August 8, 6:00 PM – 7:30 PM
Toronto Reference Library

Susan Horvath, President & CEO, ROM Governors - Moderator

Susan Horvath is a seasoned philanthropic executive with diverse leadership experience in the healthcare, education and research sectors. As President & CEO of the Royal Ontario Museum (ROM) Governors, Susan is inspired by the opportunity to build on her lifelong passion for the ROM and her love of helping donors realize great impact through philanthropy.

In her 30 years in the charitable sector, Susan has held leadership roles with the Canadian Cancer Society, Mount Sinai Hospital Foundation, Roberts Research Institute, Western University and United Way. Susan’s fundraising career was preceded by a decade as an academic at Brescia University College, affiliated with Western, where she taught and researched clothing, textiles and historic costumes. Susan holds a BSc from Western and an MSc from the University of Alberta.

As an active volunteer, Susan has held leadership positions with the Association of Fundraising Professionals (AFP), Canadian Council for the Advancement of Education (CCAE), Canadian Association of Gift Planners (CAGP) and several healthcare and community organizations. Susan's service has been recognized with several awards, including the 2016 Outstanding Fundraising Professional by AFP's Greater Toronto Chapter.

Speaking Monday, June 24, 3:30 - 5:00 PM
Royal Ontario Museum - Eaton Theatre

The Speakers
Brenda Lee-Kennedy, Partner, PricewaterhouseCoopers LLP
T: 416 218-1452 E: brenda.lee-kennedy@pwc.com
Brenda is a tax partner with PwC’s High Net Worth Services and Not-for-Profit Services Group, practicing in the areas of personal, estate and trust and private enterprise advisory and taxation, as well as charities and not-for-profit taxation and governance.

Eddy YT Leung, CPA, CA, CFF, Partner, Leung Luo Pang LLP
T: 416 335-6600 E: eddyca@rogers.com
Eddy attained the designation of Chartered Accountant (CA) through licensing by the Institute of Chartered Accountants in 1999 and obtained his designation of Certified Financial Planner (CFP) through licensing by the Financial Planners Standards Council Financial Planners Standards Council in 1999. Eddy has been practicing as Eddy YT Leung, CA since 1992 and since 2011, has been practicing with other two partners as Leung Luo Pang LLP, Chartered Professional Accountants, Licensed Public Accountants. Eddy practices in the area of small business strategic planning, accounting and reporting. This involves business growth strategies and succession planning, personal and tax planning issues and estate and retirement considerations of the corporate shareholders. Prior to practicing on his own, he was with a mid sized public accounting firm which provided extensive exposure to small businesses and professional practices.

Allan Madonik, Blue SWAN Financial
T: 416 270-5964 E: amadonik@blueswanfinancial.ca
Allan Madonik has spent over 30 years helping his clients Sleep Well At Night (hence the SWAN in Blue SWAN Financial). His father owned a mattress company and he learned the importance of protecting the owners of the business first hand, when a tragedy struck one of the partners. Allan works with small business owners and individuals protecting them through the vehicle of insurance. He volunteers and serves charitable organizations like Ve'ahavta, an organization helping individuals stricken by poverty. He sits on the Development committee, Advisory Committee, and chairs the Speakers Bureau.

Meredith Meads, CFRE  Associate Director, Major Gifts & Gift Planning, Trinity College
T: 416 946-7371 E: meredith.meads@utoronto.ca
Meredith Meads is a frequent speaker on the topic of wills and estates in the charitable and not-for-profit sectors. She is a member to a number of not-for-profit organizations. She also assists financial institutions with issues pertaining to administering estates, registered and non-registered accounts, power of attorney, and capacity matters.

Amanda Stacey, Partner, Norton Rose Fulbright Canada LLP
T: 416 216-2440 E: amanda.stacey@nortonrosefulbright.com
Serving as the Chair of the Canadian Association of Gift Planners, she is a frequent writer and speaker on a variety of estate planning, charity, and not-for-profit topics, including articles and presentations for the Canadian Tax Foundation, the Ontario Bar Association, the Law Society of Ontario, and the Estates, Trusts and Pensions Journal.

Meredith has been in involved in the not-for-profit-sector for almost 30 years, starting with a summer job canvassing for Greenpeace during university, followed by a communications role at the Ontario Public Interest Research Groups, and then on the Board of Directors for the Peterborough Folk Festival and Trent Radio. After a few years a graphic designer and apprentice stained glass artist, Meredith happily returned to both Toronto and to the not-for-profit sector. Since then, she has had over 20 years of experience in gift planning, major gifts, stewardship and volunteer management. Before joining Trinity College in 2012, she worked at The National Ballet of Canada, the Association of Fundraising Professionals, the GTA Chapter, and a fundraising consultancy firm. Meredith is a long-standing member of the Canadian Association of Gift Planners, and serves on the Executive Committee, GTA Chapter from 2013-2016 as Chair of the Mentoring Committee. She continues to volunteer as a mentor through the Chapter’s Mentorship Program. Meredith received her Certified Fundraising Executive Certification in 2018.

Rosetta Ting is a lawyer at DS Lawyers Canada LLP, an international law firm with offices in over twenty cities worldwide, including Asia, Europe, and North America. Rosetta’s practice focuses on wills and estates, corporate commercial law and commercial real estate law.

Amanda Stacey is a partner in our estates, trusts and wealth management group and our charities and tax exempt organizations group.

Ms. Stacey provides advice in the areas of wealth management, estate planning, charity, and not-for-profit law. She advises clients on wills, trusts, powers of attorney, family business succession planning, and corporate re-organizations. Ms. Stacey also advises on the establishment, tax compliance, governance, and regulation of charities and not-for-profit organizations. She also assists financial institutions with issues pertaining to administering estates, registered and non-registered accounts, power of attorney, and capacity matters.

Ms. Stacey is currently the chair of the Canadian Association of Gift Planners. She is a frequent writer and speaker on a variety of estate planning, charity, and not-for-profit topics, including articles and presentations for the Canadian Tax Foundation, the Ontario Bar Association, the Law Society of Ontario, and the Estates, Trusts and Pensions Journal.

Speaking Thursday, October 3, 1:30 - 3:00 PM
North York Central Library
Bri Trypuc, Founder, Trypuc Philanthropic Office
T: 647 428-8019  E: bri@trypucphilanthropy.ca
An Advisor in Philanthropy, Bri is the Founder of Trypuc Philanthropic Office (TPO) – an exclusively philanthropic office that provides individual, foundation and corporate clients with conflict-free, objective advice across the charitable giving spectrum. TPO specializes in Strategic Advisory, Philanthropic Plans, Foundation & Donor Advised Fund Management, Charity Analysis & Benchmarking, Major Projects & Philanthropic Travel. Prior to TPO, Bri was Head Client Advisor and instrumental in the creation of Charity Intelligence Canada, a national brokerage and advisory firm for donors. A pioneer of charity analysis in Canada, Bri has performed equity-style research and analysis on hundreds of Canadian charities that range from start-ups to some of Canada’s largest and most sophisticated organizations. Previously, Bri worked in private wealth management at Cougar Global Investments, initiating its philanthropic advisor efforts. This was followed by international experience with New Philanthropy Capital in London, England, She holds an Honors BA in Sociology from the University of Western Ontario and is a Post-Graduate in Resource Development.

Matthew Urback, Partner, Shibley Righton LLP
T: 416 214-5209  E: matthew.urback@shibleyrighton.com
Matthew Urback is a Toronto-based lawyer, practising in the areas of Civil, Commercial, and Estate Litigation. He has appeared before the Ontario Court of Appeal as well as various courts of the Ontario Superior Court of Justice, including the Estates List and the Commercial List. Matthew first joined Shibley Righton LLP in 2010 as an articling student, where he gained valuable experience relating to litigation. He returned to the firm as a lawyer in 2011, where he has practised since.

Matthew has a particular focus on Estates, Wills, and Trusts Litigation. He has experience with a variety of practice areas within this field, such as will challenges, guardianship applications, passing of accounts applications, solicitor’s negligence, and other estate disputes. He acts for fiduciaries, both individual and institutional beneficiaries, and drafting solicitors. Matthew also has experience drafting wills and powers of attorney.

Matthew regularly writes articles and contributes to stories about current issues in Estates Law. He has been featured recently in the Lawyer’s Daily, Investment Executive, CBC News Radio, and the Financial Post. Prior to his law career, Matthew graduated from law school at Queen’s University where he made the Dean’s Honour List and won the R.W. Leonard Prize in Trusts. While at Queen’s, he was a columnist for the law school newspaper and President of his graduating class. Prior to law school, he obtained his Bachelor of Science (Honours) in Mathematics and Human Biology at the University of Toronto, and graduated with Distinction.

In his spare time, Matthew enjoys sports, travelling, and spending time with his family.

The Speakers

Robin Turack, VP, Business Development, PearTree Canada
T: 416 931-0002  E: robin.turack@peartreecanada.com
At PearTree, Robin Turack brings her donor/client centred approach to her focus on developing deep and sustainable client relationships in the GTA and across Canada. Robin works closely with current and prospective donor clients, their charitable causes and their advisors. Robin has applied her entrepreneurial leadership style at leading Canadian and international institutions and her collaborative approach has resulted in highly successful marketing, sales, philanthropic, media and communications ventures. As a volunteer, a consultant and an executive, Robin brings multiple perspectives and expertise to PearTree. Robin was a member of the ROM Ball 2017 and the ROM Ball 2019, Fundraising & Planning Committee. She is also involved with the AGO Art Bash, the Israel Cancer Research Fund, Ignite the Spark for Children’s Aid Foundation and the Canadian Hadassah Wizo’s “At Our Table” in 2007, Robin and her daughters created the successful Blue Brain Bracelet Campaign to support The Gerry and Nancy Pencer Brain Trust and The Turack Family Fund for Pediatric Oncology at Princess Margaret Hospital. Robin is a graduate of the Kellogg School of Management at Northwestern University in Chicago focusing her executive studies on Innovation and Social Entrepreneurship, Successful Fundraising Strategies, Internet and Social Media Marketing, Crisis Management, and Executive Management Education for Jewish Leaders and she continues to be a member of the Kellogg Jewish Leaders Circle.

Speaking Monday, June 24, 3:30 – 5:00 PM  Royal Ontario Museum

Lives & Legacies at the ROM

A promised gift to the Museum to preserve our natural and cultural heritage

If you ask Iris Toppings about her favourite part of the ROM, she’d be quick to point out the incredible breadth of the Museum’s galleries of art, culture, and nature that inspire learning and discovery. A long-time member of the Department of Museum Volunteers and an avid reader who actively keeps abreast of current events, she feels that understanding our present and future often demands looking back to the past.

For many visitors whom Iris regularly leads on tours of the ROM’s exhibitions and galleries, this passion for knowledge is clearly evident. She recounts Water: The Exhibition (2011) as one of her most memorable experiences as a docent over the past eight years, which provided ample opportunities to engage visitors in what remains a critical issue of our day. “I was moved by the life-giving aspect of water—and the danger of it being wasted and polluted,” Iris remarks.

By including the ROM in her will, Iris is leaving a gift that will help ensure that the Museum can continue to provoke dialogue and action on issues that matter to our communities and planet for generations to come. “A gift to the ROM supports an institution that is on the cutting edge of collecting, preserving, and studying materials from our natural and cultural worlds,” says Iris. “Society is always the beneficiary of this endeavour. It is part of our common heritage.”

MAKING A BEQUEST

A charitable bequest is a promised gift given through your will. It’s a simple way to make a significant contribution to the ROM while maintaining your present financial security. Your bequest may be given for the Museum’s highest priority needs, for a specific program, or to establish a permanent endowment fund.
For too long, estate planning has been put on the “I’ll get to it someday” list. And too often, families experience the chaos of closing an estate where wishes are not clearly outlined. Give yourself and the people you love peace of mind by creating your estate plan on Willful. Our platform also helps you leave a positive legacy by allocating part of your estate to the charities and non-profits you care about.

Create a will and power of attorney documents in less than 20 minutes at Willful.co - use code LEGACY15 for 15% off any plan.

Contact hello@willful.co with any questions, or to find out more about how we’re supporting causes across Canada.

Legacy Challenge

What do you want your legacy to be?

I’m sure that you have sponsored a charitable event or three in the past. Perhaps it was in recognition of a hospital, a dreaded disease, or another of the more than 85,000 charities that reside in Canada. Giving money is crucial to the success of many organizations. However, volunteering may be as crucial or perhaps even more important. According to Imagine Canada (2010), 13 Million Canadians contributed more than 2 billion volunteer hours to charities. It provided 8% of the economic activity and a whopping $86.6 Billion dollars to the economy.

On Wednesday May 22nd, Blue SWAN Financial is partnering with Ve’ahavta, a charity focused on eliminating poverty and hunger in Toronto. According to Ve’ahavta, there are approximately 235,000 Canadians experience homelessness in a year. Over 1,350 people die each year and the average life expectancy of 39 years old.

BSF founder Allan Madonik invites you to come out and help pack food, hygienic products, and clothing into bags. There will be a light dinner and a quick overview of the ‘Legacy Challenge’ as well as a review of all the amazing programs at Ve’ahavta to help those less fortunate get back on their feet. Then, Allan and his children will deliver the kits to people in the shelters and on the streets of Toronto.

Be a part of the ‘Legacy Challenge’ and help those less fortunate than yourself.

If you can’t make the May 22nd event, contact Allan amadonik@blueswanfinancial.ca to find out about the next ‘Legacy Challenge’ event this year. Together, we can make a difference!
Your Legacy: Our Future

With your support, we will continue to blaze new trails in lifelong learning for many years to come.

A legacy gift is a rewarding and meaningful way to make a difference in the lives of our students. Humber College, one of the largest colleges in Canada, holds the current and future success of its students as its highest priority. With your gift, you can play a key role in developing highly skilled and adaptable citizens who will contribute to building vibrant, healthy and prosperous communities.

To find out more about legacy giving at Humber College, contact Krista O’Donnell at 416.675.6622 x5386 or krista.odonnell@humber.ca.

Your Gift Will Move The World

Leave a gift in your will to The National Ballet of Canada and make a lasting contribution to the cultural vibrancy of Toronto and Canada for future generations.

To learn more about how to leave a legacy gift, please contact Richard Lefebvre at rlefebvre@national.ballet.ca or 416 345 9686 x324

Elena Lobanova. Photo by Karolina Kuras.
Make Parkinson Canada part of your legacy.

Leaving a gift in your Will helps to transform lives by fueling research and providing education, advocacy and services that support the Parkinson’s community.

Ask us how by contacting
Sue.Rosenblat@parkinson.ca
1 800 565 3000 ext. 3386
316–4211 Yonge St., Toronto, ON M2P 2A9
parkinson.ca
Charitable Registration No 10809 1786 RR0001

A purposeful life deserves a lasting legacy.

The decision you make today can shape an even brighter future for the world’s children for generations to come. Resolve to let your spirit of hope and giving live on. For every child.

Choose to make a charitable bequest in your Will to UNICEF Canada.

To learn more, contact bequests@unicef.ca or call Jackie Jones, Legacy Giving Manager, at 1 800 567 4483. www.unicef.ca/legacy

90 Eglinton Avenue East, Suite 401, Toronto, ON M4P 2Y3 Canada

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Your will is their future.

Your gift moves us closer to a cure.

Your gift moves us closer to a cure.
Your legacy gives them a life worth living

You envision a world in which animals live free from cruelty and suffering. Where they have the freedom to express themselves without fear or distress. Your legacy can be one that changes animals’ lives for good.

Let’s make a better future together. For more information on how you can become a World Animal Guardian please contact Tiffany Oliveira, Donor Relations Manager 416 369 0044 x122 mylegacy@worldanimalprotection.ca

worldanimalprotection.ca/mylegacy

Boost your charitable giving
Learn more about flow through share donations so you can increase and accelerate your charitable giving at a lower after-tax cost. PearTree offers a unique and proven format and we are proud to support important causes across Canada.

Maximisez vos chances de recueillir des dons importants
Apprenez en davantage au sujet des dons d’actions accréditives, pour voir augmenter et s’accroître vos dons de bienfaisance à un coût net après impôts nettement plus favorable. PearTree propose une formule unique, qui a fait ses preuves. Nous sommes fiers de soutenir des causes importantes d’un bout à l’autre du Canada.

Find out more at peartreecanada.com

POWER
FROM YOU’RE GOING TO BE OK
TO YOU’RE GOING TO RUN 5K

Your generous legacy gift helps people like Patrick recover from extreme physical challenges and get their lives back. After he lost his leg in an industrial accident, the therapists at West Park went beyond simply teaching him to walk again, they returned him to what he loves – running.

A GIFT IN YOUR WILL HAS THE POWER TO TRANSFORM LIVES AND CREATE A LEGACY THAT WILL NEVER BE FORGOTTEN.

To learn more, please contact Ashleigh Manzon
416-243-3600 x 4215
ashleigh.manzon@westpark.org
westpark.org/foundation

MAKE YOUR WILL A DOCUMENT THAT BEGINS A LIFE.

That’s what a will can be. A will that leaves a gift to SickKids is an opportunity to create a future – one where a child with the most challenging health issues is successfully treated, and goes on to live a long, healthy life. If you want children to go through cancer treatment without long term side-effects, or have their heart defects healed by their own stem cells, we can show you how to leave a legacy to make that future happen. Make your will one that begins many lives. Visit planforsickkids.com or call 416-813-8271.
Where there’s a will, there’s a way.

Life with blindness isn’t easy. We live in a visual world, and people who are blind must constantly adapt and overcome. Thanks to the CNIB Foundation, they don’t have to do it alone. We give Canadians who are blind the tools, opportunities and training they need to lead full, active lives. Because we believe that where there’s a will, there’s a way.

Your will can lead the way for people in your community who are blind. Call Ruth D’Souza at 1-800-563-2642 (7006) or email ruth.dsouza@cnib.ca to learn more about leaving a legacy gift for the CNIB Foundation.

Legacy Gifts Make an Impact

“To know that so many people make arrangements for future gifts to help others acknowledges the selflessness and humanity in the world.”

— Shawnette Bankasingh

As a York University student, Shawnette Bankasingh (BA ’14, BEd ’15) was grateful to receive financial support from the George Tatham Bursary. It was created with a $65,000 bequeathed gift in the Last Will and Testament of former York student, John Terrance “Terry” Gardner (BA ’71). Terry wanted his legacy to honour the memory of Professor George Tatham, York’s first dean of students and master of McLaughlin College.

During the past 20 years the George Tatham Bursary financially helped 70 students realize their educational dreams and potential. Shawnette states, “The George Tatham Bursary continually inspires me to support other people. As an educator, I want to instill that philosophy into my students and my son.”

Shawnette is now a teacher with the Toronto District School Board and she gives back by providing her students in Toronto’s Jane-Finch area with extra resources for enriched learning experiences. This is the impact of legacy giving.

To learn more about leaving a gift to York University in your will, contact Marisa Barlas at 416-650-8221 or legacy@yorku.ca MyYorkLegacy.com
HELP LEAVE A LEGACY

After your loved ones are provided for, please consider leaving a legacy that will safeguard our environment for future generations.

1.800.926.7744
smay@ecojustice.ca

Ecojustice uses the power of the law to defend nature, combat climate change, and fight for a healthy environment for all.

SOWING THE SEEDS FOR THE NEXT GENERATION

Ecojustice donor Ellen Maclean in her garden

I've had a passion for gardening since I was four years old. One of my great joys is spending time in my own backyard in downtown Toronto, where I've grown a beautiful pollinator garden and I produce a bounty of fresh organic fruit and vegetables for my family every year. My garden is a peaceful sanctuary that gives me the opportunity to connect with nature every day. It makes me appreciate the positive impact we can have on our environment when we enrich the soil and preserve biodiversity.

I believe that citizens need an advocate to stand up for our precious, beautiful earth in the courts, and that is why I have been an Ecojustice supporter for many years. Ecojustice is a powerful advocate for nature and a defender of people and planet.

After seeing the film Anthropocene, I made a pledge to do something for the planet every single day, no matter how small. One of the easiest ways I realized I could do this was by increasing my support of Ecojustice, as my partner in this mission. I decided to make a gift in my will which gives me a measure of security knowing that I'm contributing to an organization that is keeping Canada on the right path.

Our son, now 32 years old, may have a family one day who will grow up in a very different world than I did. I believe we have to support younger people who are leading the movement to save our planet from irreversible climate change. Supporting an organization that is committed to using the law to combat climate change and defend future generations is one way we can all do that.

To learn more about how leaving a gift in your will can help protect nature for future generations, please contact Ecojustice’s Philanthropy Officer Sarah May at smay@ecojustice.ca or 1.800.926.7744 ext 293.
Two years after a debilitating stroke, Diane is back to hiking and canoeing, thanks to the remarkable work of world-renowned neurologists at St. Michael’s Hospital. She’s showing her gratitude with an annual donation and a bequest. This is her story.

It was one of those easy summer days, perfect for a leisurely canoe paddle. But not long after Diane and her husband Stan set out, Stan noticed Diane was unusually quiet. Worried, he decided to take her back to the cottage. As they docked, Diane became disoriented. A friend waiting at the dock recognized the symptoms, fresh from his own wife’s experience: Diane was having a stroke. Stan rushed her to the hospital in Parry Sound. Her condition quickly worsened. She couldn’t swallow. She needed a feeding tube. Then she couldn’t speak or move the left side of her body.

A CT scan confirmed their suspicions, and Diane was air transferred to the closest regional stroke centre, located in Sudbury. After a difficult week waiting for the pain to subside, a second flight was arranged. This time, to St. Michael’s Hospital in Toronto.

At St. Michael’s, Diane was cared for by world-leading neurology experts who are renowned for taking on some of the toughest cases. Finally, Diane was ready for a rehabilitation facility where she would undergo intensive therapy. Four weeks later, Diane made it home.

"Having a stroke was one of the most difficult challenges I’ve ever encountered. I have profound appreciation for the important role St. Michael’s physiotherapy team played in my recovery,” says Diane.

Diane's stroke wasn’t the family’s first brush with St. Michael’s. Over the years, they witnessed the compassionate psychiatric care their cousin, Katherine Gerstl, received. When Diane became co-executor of Katherine’s will, she didn’t hesitate to donate a large portion from the estate to support the work of Dr. Sidney Kennedy, a scientist at St. Michael’s Li Ka Shing Knowledge Institute and the Arthur Sommer Rotenberg Chair in Suicide and Depression Studies.

"Our success over the years has given us the privilege to support worthy causes like St. Michael’s Hospital,” says Stan.

To learn more about how to leave a bequest in your will to St. Michael’s Hospital Foundation, please contact Ericka Tovey, Senior Director, Philanthropy at ToveyE@smh.ca or 416-864-5246.
A GIFT IN YOUR WILL KNOWS NO BORDERS

By remembering Médecins Sans Frontières/Doctors Without Borders Canada in your will, you are making an extraordinary commitment. Your legacy will help provide medical assistance to people in need, whoever and wherever they may be.

Please contact Rhona Rahmani
1-800-964-7903 ext. 3630
rhona.rahmani@msf.ca
doctorswithoutborders.ca/mylegacy

Leave a lasting legacy for future generations

Make a charitable gift in your Will to Scarborough Health Network Foundation – it’s easier than you think.

Your legacy will help us transform healthcare for generations to come.

For a confidential discussion about including Scarborough Health Network Foundation in your Will and other gift options, contact Verna Chen at 416-438-2911 ext. 6040 or email vchen@shn.ca
OFFERING INNOVATIVE ADVICE TO CHARITIES ACROSS CANADA AND ABROAD

With one of the most sophisticated practices in Canada dedicated to helping charities and not-for-profits, Miller Thomson provides a wide range of services designed to meet all of your legal needs, including:

- Establishing and registering charities and not-for-profits;
- Charitable gift planning;
- Charities tax planning, governance and regulatory advice;
- Social enterprise and social finance; and
- Structuring endowments, private foundations and other charities.

For more information, please contact:

Susan Manwaring
Leader, Social Impact
416.595.8583
smanwaring@millerthomson.com

Andrew Valentine
Partner
416.595.2980
avalentine@millerthomson.com

Subscribe to our complimentary Social Impact newsletter for the latest trends and developments: millerthomson.com/subscribe

When you make a legacy gift, you join the TPLF Heritage Society. To learn more about membership benefits as well as planned and tax-smart giving, please contact:

Liza Fernandes, Director, Legacy Gifts
lfernandes@torontopubliclibrary.ca
416-397-5924

Your thoughtful planned gift benefits you, your family and Toronto Public Library

Remembering TPL in your will, RRSP or life insurance ensures the work of the Library continues for generations to come.

Learn more about making a bequest. tplfoundation.ca/plannedgift
Every gift in every will makes a difference

Include a gift in your will to Plan International Canada to continue to promote the rights of children and equality for girls around the world

plancanada.ca/wills

A Gift in your Will can save lives

“For the level of comfort and humanity that I have experienced from The Princess Margaret staff, I wanted to ensure that their work continues, now and when I’m not here.”

Susan Newman, patient/donor

Including The Princess Margaret Cancer Foundation in her Will is Susan’s way of doing just that. If you would like to join Susan and many others in supporting vital cancer research please contact legacy@thepmcf.ca or call 416-946-2295.

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www.jewishfoundtiontoronto.com

Michael Garron Hospital Foundation
(Formerly Toronto East General
Hospital Foundation)
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Planned Giving Officer
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E: Debbie.Owen@tehn.ca
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WHY I LEFT A GIFT TO TORONTO PUBLIC LIBRARY IN MY WILL

The Library MADE my life and SAVED my career. When I was young, I fell in love with books and the Library held unlimited adventure. Now I work in a non-profit environment where often there is no formal training or budget for advancement. When I asked my mentors for books that changed their careers, I literally spent a year at the Library, pouring through close to 100 different titles. These books transformed my career in terms of capacity, ability, management and leadership.

The Library has always been there for me, and I wanted to show my gratitude. At this stage of life, with a young family, I don't have the financial capacity to make the kind of cash gifts I'd like to make. Having a will in place not only protects my loved ones but also supports the causes I care about. Thanks to the information the TPL Foundation provided, leaving a gift to the Library was easy to do. I encourage everyone who loves the Library to consider making a bequest.

- Paul Nazareth, lifelong Library user and avid supporter.

To learn more: Contact Liza Fernandes, Toronto Public Library Foundation at 416-397-5924, via email at lfernandes@torontopubliclibrary.ca or visit https://tplfoundation.ca/estate-and-tax-smart-giving/
TOP 10 THINGS You Can Do Today To LEAVE A LEGACY™

When you leave a gift in your will to your favourite charities, you ensure the long-term financial health of those organizations.

1. Prepare a will; without it you lose control of the possessions you’ve worked a lifetime to acquire.

2. Ensure that your loved ones are taken care of and all expenses/debts are paid.

3. Call the charities of your choice; ensure that you have their correct legal name, charitable registration number and discuss how your wishes will be honoured.

4. Add your favourite charities to your will.

5. Remember loved ones with a donation in their honour or in their memory.

6. Make a gift of appreciated securities or real estate; take advantage of tax savings.

7. Name a charity as one of the beneficiaries or alternate beneficiary of your RRSP/RRIF, pension plan or TFSA.

8. Designate a charity as the beneficiary of an existing life insurance policy that your family no longer needs.

9. Purchase a new life insurance policy and name a charity as the beneficiary.

10. Create a Donor-Advised Fund by making an irrevocable, tax-deductible donation to a public foundation or charity that offers this option.

www.leavealegacy.ca

LET STANDING UP FOR KIDS BE YOUR LEGACY.

Every child deserves a happy childhood.

Through no fault of their own, children involved in the child welfare system have experienced unimaginable trauma, abuse, and neglect.

A gift in your Will can be your lasting legacy and can change theirs. It will break the cycle for future generations and help countless children to grow, thrive, and lead happy healthy lives.

Join us and Stand Up for Kids.

Learn more at cafdn.org/legacy or contact Jane Durno, Director, Special Projects at jdurno@cafdn.org or 416-923-0924 x232.
YOUR PROMISE TODAY WILL CHANGE LIVES TOMORROW

HELP HEAL THE FUTURE WITH A GIFT IN YOUR WILL TO SUNNYBROOK

The choices we make today can dramatically impact the world we leave for tomorrow. Your legacy gift to Sunnybrook will help us continue the groundbreaking research that is changing outcomes for patients today and will provide new life-saving options for future generations.

Learn more about leaving a legacy gift to Sunnybrook. Please contact:
Nancy Collett
416-480-6100 ext. 93228
nancy.collett@sunnybrook.ca

FROM TERRY’S LEGACY TO YOURS

It’s got to keep going without me.

In 1980, cancer forced Terry Fox to stop his Marathon of Hope. For the last 39 years, millions of Canadians have helped us build a legacy in his name – one that holds true to his values of integrity and support for those in need. Honouring Terry’s legacy has allowed us to fund outstanding cancer research, but we’ve got to keep going – the future for cancer patients depends on it.

Ask us how we can help create a meaningful gift as part of your estate plan.

To learn more, please contact:
Clark Vallis, Manager, Philanthropic Relations
clark.vallis@terryfox.org | 647.346.2352 or visit: terryfox.org/legacygiving
...YOUR LEGACY MADE AN IMPACT ON 18 POWERFUL COMMUNITY ORGANIZATIONS WORKING FOR WOMEN AND GIRLS?

JOIN A COLLECTIVE OF WOMEN WHO HAVE MADE A LASTING COMMITMENT TO DO JUST THAT.

FIND OUT MORE from Aneil Gokhale at agokhale@torontofoundation.ca or 416-921-2035 ext. 212

THE TRUST COLLECTIVE
Investing with a focus on women and girls

YOUR LEGACY CAN CREATE ANOTHER

We invite you to include Sinai Health Foundation in your Will to have an extraordinary impact on future generations. Your legacy will fuel discoveries at Lunenfeld-Tanenbaum Research Institute, and support world-class care across Sinai Health. Your legacy can transform the future of health care.

To learn more please contact:
Susan Davis LLB, LLM
VP Governance & Chief Administrative Officer
susan.davis@sinahealthsystem.ca
T 416-586-5910
supportsinai.ca/legacy
A LEGACY GIFT IS HELPING SABRINA TAKE CENTRE STAGE

As this year’s winner of the McAndrew Family Scholarship, Sabrina—a mid-year drama student at University College—can now pursue extracurricular activities. The award has gifted her with time to rehearse, to be an assistant stage manager for a major campus production, and to apply for internships at theatre companies across Toronto. “Serious drama students are working constantly to get ahead and to stand out,” she says. “I’ll always be grateful to the McAndrew family for boosting my success.”

Leave a bequest to the University of Toronto and help students like Sabrina realize their dreams.

Find out more from michelle.osborne@utoronto.ca
416-978-3811 or donate.utoronto.ca