

A large, faded background image of a family of four smiling together. The father is in the center, with a young boy on his left and a young girl on his right. The mother is partially visible behind them. The overall tone is warm and positive.

 FONDATION
HÔPITAL
MONT-SINAÏ | MOUNT SINAI
HOSPITAL
FOUNDATION

LEGACY GIFTS AND SECURITIES

A way to keep caring



This publication gives a general outline of how gift planning can meet your needs. It is no substitute for professional legal and financial advice. Legal requirements and tax laws can change, and regulations will vary depending on where you live. *To make certain your plans are best for your situation, do consult your financial planner, attorney, notary, and/or accountant.*



Dear Friend of Mount Sinai,

When my mother Johanne Capra Hébert came to Mount Sinai to learn how to live with her emphysema, she formed a real connection with this hospital. Later, in her last years, she became a patient here. The many people who cared for her were really her second family—and as we continued visiting her, they became part of our family, too.

Today, as you surely know, we face a whole world of changing needs. The Mount Sinai Hospital Foundation is a wonderful resource every part of the hospital can come to—where they know they will get a friendly ear and the resources to accomplish what needs to be done.

This little booklet shows you how you can make a plan to support the Foundation in the future. Your support will do a world of good for Mount Sinai, a hospital that serves our whole community.

We are here for you and your loved ones. Please be here for us today and in the years to come!

Louise Hébert-Lalonde

Chairman
Mount Sinai Hospital Foundation

GIVE YOURSELF THE SATISFACTION OF *planning your legacy*

You don't have to be wealthy to arrange to leave part of what you have today for the good of others tomorrow. It might be to your advantage to begin with a gift today, while also planning for that good work to continue in the future.

WHAT CAN YOUR LEGACY ACCOMPLISH AT MOUNT SINAI?

A bequest from **ADINA CAHANE** funded a full patient suite (new bed, patient chair, and other furniture).

JEAN-FRANCOIS GIROUX saw first-hand the special care his wife received when she was able to stay home at the end of her life. He established an endowment in his Estate to fund palliative home care.

ELIZABETH SMITH provided funding through her Estate to the Art Therapy program. As a past patient of Mount Sinai, she wrote: "Expressing myself in painting at one of Sinai's art classes helped me cope and heal."

MORTON CHARAD provided a bequest to be used at our discretion, enabling us to respond to the greatest needs of the hospital.

JOHN DLUSY left a significant gift in his Will to support in-patient respiratory rehabilitation. Earlier, because he wanted to see his donation working right away, he gave a portion of that contribution outright to create the Nathan Dlusy Rehabilitation Unit in honour of his late brother.



The Healing Garden

The Healing Garden next to the hospital has wide paths so patients in wheelchairs can enjoy the sunlight and greenery, and visit with their families. It was created as a memorial for Nettye and Henry Greenberg, whose family continues to support its upkeep today.





Mount Sinai Hospital was established in 1909 in Ste.-Agathe, Quebec, to provide modern care to people with tuberculosis. Ever since then, it has led in offering progressive, multi-dimensional treatment for those experiencing respiratory problems. Today, patients look to Mount Sinai to receive a rich variety of integrated health services for pulmonary rehabilitation, post acute care, long term care, and end-of life (palliative) care.



A proud century and more

The Mount Sinai Sanatorium was founded in Sainte-Agathe-des-Monts to treat patients with tuberculosis.

Montreal's Jewish community raised money to build a larger complex with upgraded facilities to meet the increased demand for services.

Mount Sinai Hospital Foundation formed.

The Hospital moved to its current location in Montreal to be closer to the population it served. It expanded its mission to include a palliative department and long-term care. The state-of-the-art building had 107 beds, an out-patient department and a wide range of diagnostic and treatment services.

Sleep Clinic established.

Palliative home care introduced.

Outpatient and distance pulmonary rehabilitation programs established.

Rehabilitation program expanded to include post-acute patients

Began treating Covid 'long haulers'; we are recognized as a centre of excellence in this emerging field.

1909

1920's

1973

1990

1996

2001

2017

2019

2021

EXCLUSIVELY FOR LEGACY DONORS TO MOUNT SINAI

Sinai Legacy Society

The Sinai Legacy Society was created to celebrate all the visionary donors who have left a gift in their will or made other legacy plans in favour of Mount Sinai Hospital.

As a member of the Sinai Legacy Society your generosity will be celebrated in a way that will ensure your gift will never be forgotten – welcoming you to a special community of donors.

You'll receive the opportunity to

- **Enjoy meeting fellow Legacy donors** and Sinai leadership at our annual Sinai Legacy Society event.
- **Hear presentations** from some of our extraordinary healthcare teams.
- **Gather and exchange** with generous, like-minded people.
- **See your name** on the new Sinai Legacy Society wall.

Your membership in the Sinai Legacy Society is our way of thanking you for sharing a part of your life's work for the benefit of countless patients and families at Mount Sinai Hospital.



Getting started

Mount Sinai has touched your life, or the life of someone you love. When you include a bequest or other legacy gift to the Mount Sinai Hospital Foundation as part of your estate plan, you are choosing to make an important difference for others in the years to come.

If you die without a will, you have no control over who will inherit your property. Your estate will be distributed according to a single, specific formula that is applied to everyone in the jurisdiction where you live. This might not only fail to respect your wishes, it might also

create tax or other consequences you did not intend.

Many people find that making a will brings them great satisfaction: this simple act expresses the values closest to your heart. We recommend that you obtain professional advice. See *note inside front cover*. These experts can keep you abreast of the most current tax and estate laws. Charitable tax receipts, issued for gifts received through charitable bequests and other forms of legacy gifts, can provide important tax benefits to your estate.

We would be pleased to share examples that may be useful in your own situation, and to work with you or your advisor in choosing wording to best address your charitable intentions. We also encourage you to include both our legal name (**Mount Sinai Hospital Foundation**) and our charitable registration number (**11892 4331 RR0001**) in your instructions.



Ways to leave a legacy

GIFTS IN YOUR WILL

Remembering the Mount Sinai Hospital Foundation in your will is a powerful, generous, and simple act. Doing this—making a bequest—might allow you to leave a larger gift than would be possible during your lifetime. You can make sure that what is important to you will continue to flourish.

There is no immediate cost to you, and you retain control of your assets. You can bequeath cash, securities, or a certain percentage of your estate. Gifts made through your will can lower or even eliminate taxes owed on your final estate.

You may also choose the purpose for which your gift will be used.

UNRESTRICTED BEQUEST

Your gift will support the areas of highest priority, providing flexibility to respond as situations change. The funds can be used where they are most needed.

RESTRICTED BEQUEST

Your gift can support a specific area of care at Mount Sinai Hospital. (Talk to us about this choice to make sure it is doable.)

RETIREMENT FUNDS

Designating the Foundation as a beneficiary of your RRSP or RRIF funds is a tax-smart way to leave a lasting legacy. You retain ownership of your funds now, while your estate will benefit from a tax receipt for the value of your gift later. Donate all or simply a portion—it's up to you.



Gifts during your lifetime

LIFE INSURANCE

Whether you have an existing policy or buy a new one, a gift of life insurance can turn your small monthly premiums into a significant donation. Your financial planner can work with you to create a life insurance gift that supports the Foundation in the future while you enjoy the tax benefits now.

CHARITABLE ANNUITIES

You can make a gift to the Mount Sinai Hospital Foundation and, at the same time, secure guaranteed income for a specific period of time or for life. An annuity consists of two parts: a gift to the Foundation, for which you receive a charitable tax receipt, and a guaranteed stream of income for yourself and, if applicable, your surviving partner.

SECURITIES

When you transfer stocks, mutual funds, or bonds to the Foundation your gift has immediate impact. It eliminates the capital gains tax you would need to pay if you sold the securities and then donated the proceeds; in addition, you receive a charitable tax receipt for your donation. You can give now, or as part of your estate planning. Discuss which options are right for you with your loved ones and with your financial or legal advisor.



MOUNT SINAI HAS TOUCHED YOUR LIFE,

*or the life of someone
you love*

Legacy giving, whether arranged as a gift through a will, a gift of securities, or by other means, is a powerful way for you to sustain this little hospital's proud tradition of caring.

Let's start planning your legacy together

5690 Cavendish Boulevard, Montreal, Quebec H4W 1S7

Kara Maritzer, CEO

Phone: 514-369-2222 #1300

Fax: 514-369-3378

Email: info@mountsinaifoundation.org

Website: www.mountsinaifoundation.org

PLEASE NOTE: *This publication gives a general outline of how gift planning can meet your needs. It is no substitute for professional legal and financial advice. Legal requirements and tax laws can change, and regulations will vary depending on where you live. To make certain your plans are best for your situation, do consult your financial planner, attorney, notary, and/or accountant.*

