



Welcome to the Community Planned Giving Program Newsletter

The Planned Giving Newsletter is back after a long hiatus. We have lots of wonderful and exciting news to share with you, so please take a look.

New Community Planned Giving Partner



Jeffery Hale Community Partners is proud to announce BMO Nesbitt Burns as the official sponsor of the Community Planned Giving Program. BMO Nesbitt Burns is extensively involved with the English-speaking community in Quebec City and we are delighted with this new partnership and look forward to working with them.

Our initial partnered activity will be a **free breakfast workshop on November 23, 2009, titled, "Maximizing Your Charitable Donation"** - a pertinent topic today. Our guest speaker is Mr. **Sebastien Tremblay**, CFA, Vice-President, Branch Manager and Portfolio Manager of BMO Nesbitt Burns in Quebec City.

Mr. Tremblay joined BMO Nesbitt Burns in 1997, Mr Tremblay holds a B. Sc. In finance from Laval University and also holds the Chartered Financial Analyst (CFA) designation. He is Portfolio Manager and the Branch Manager of the Quebec City BMO Nesbitt Burns branch. His team provides investment advisory services to high net worth families, foundations and endowment funds

I encourage all who donate or are thinking about a planned gift, to attend this informative workshop.

Workshop: "Maximizing Your Charitable Donation"

Date: November 23, 2009

Time: 7:30 am - 9:00 am

Place: Jeffery Hale Pavilion

1270, chemin Sainte-Foy, suite

1123/1125

Please RSVP by November 17: Nectaria Skokos, Planned Giving Officer 418-684-5333, ext. 1517 or by e-mail at: nskokos@jhpartners.net

We invite you to bring a canned good donation for the Christmas Hamper Campaign.

We look forward to seeing you!

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Canadian Charitable Donations



Canadians contribute more than \$8 billion annually to their favourite charities - no small sum. And there have never been more distinct ways to donate than there are right now.

Although we generally make charitable donations for philanthropic reasons, there are many income tax incentives provided for charitable gifts. For individuals looking for tax effective donation alternatives to the traditional gift of cash, recent federal budget changes have made a gift in-kind of investment securities very appealing. In particular, the tax on a capital gain realized on the donation of certain publicly traded securities to a qualified charity can now be eliminated. In addition to the elimination of the capital gains tax, you will receive a tax credit for the full value of the donation. Donating publicly traded securities, such as shares, bonds and mutual funds, not only helps the charities involved but translates into valuable income tax savings for you. It's a win-win proposition!

Other ways to support charities include:

- Leaving a sum of money or publicly traded securities to a charity in your will;
- Establishing a donor-advised fund;
- Establishing a charitable remainder trust; or
- Naming a charity as beneficiary on your life insurance policy.

These are just a few of the more complex charitable giving strategies available to you, and each one has unique advantages. Depending on how the gift is structured, you can reduce your annual income tax bill or help your estate offset capital gains taxes in the future. Your individual circumstances will determine which one is right for you.

Our partnership with community foundations across the country means you also get access to front-line expertise about the issues and organizations in your community. Community foundations work closely with the charities in your community and have a deep understanding of local priorities.

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Community Planned Giving Partner Feature

Jeffery Hale Friends' Foundation
By Gail Quinn, Jeffery Hale Friends' Coordinator



The Jeffery Hale Friends' Foundation was created in 1991. The mission of the foundation is to raise money to support the Jeffery Hale in its quest to provide quality health and social services to all its residents and clients, in a safe and caring setting.

Quality is what the Jeffery Hale is all about; quality of life, care, services and people. Funding from the Jeffery Hale Friends' Foundation has contributed to that quality in many ways. Since its inception in 1991, the Foundation has given close to \$1,000,000 to the Jeff for many programs and projects including: medical, diagnostic, therapeutic and rehabilitation equipment; palliative care services; staff training and support; leisure activities and equipment for long term residents and much more.

The Foundation organizes fundraising activities such as the annual Jeffery Hale Golf Tournament, a summer Jazz Concert, as well as an annual art exhibit, "Exposition Revelation". People also give money to the foundation in memory of someone who has passed away while others like to give money to a specific program or department. Some people also make the Foundation part of their planned giving strategy. There are many options. People can indicate on the donation form where they would like to see the money go: where it will help the most, geriatric care, palliative care, community services in English or community art.

People like to give money to institutions and causes they believe in. The Jeffery Hale is an honorable cause and a donation to the Jeffery Hale Friends' Foundation is an investment in the health of its people and the institution. A simple donation will help to make the Jeffery Hale a place we can all be proud of; an environment that is caring and professional. Residents, families and clients of the Jeffery Hale will benefit from the generosity of people in our community.

For more information about the Jeffery Hale Friends' Foundation, please contact Gail Quinn by e-mail at gquinn@jhpartners.net or by telephone at (418) 684-5333, ext. 1655.

Request for Donor Stories

I am in the process of putting together a **Donor Story Booklet**. I invite donors to write in about why they give - why it is important to them. I also invite recipients of donations to write in and describe the impact of the donation on themselves and their families.

Please send your stories to Nectaria Skokos at nskokos@jhpartners.net

National Philanthropy Day, November 15

On November 15, National Philanthropy Day (NPD) will be celebrated across North America. It is a special day set aside to recognize and pay tribute to the great contributions that philanthropy and those people active in the philanthropic community have made to our lives, our communities and our world.

Jeffery Hale Community Partners along with the Jeffery Hale Friends' Foundation, the VEQ Foundation, the Morrin Centre, the Citadel Foundation and the Megantic Community Development Corporation are presently planning a **fundraising event** celebrating philanthropy in the English-speaking community of Quebec City and Chaudière-Appalaches regions for November 2010. Additional details will be provided to the community in the coming months.

If you would like more information about the fundraising event, please contact Nectaria Skokos at 418-684-5333, ext. 1517.

Christmas Hamper Campaign 2009

What better way to celebrate philanthropy than to donate to the 14th Annual Christmas Hamper Campaign, officially launching on November 8, 2009 and lasting until December 13, 2009. The Campaign helps over 200 families in need in the English-speaking community in the Quebec City region.

Non-perishable food items, hygiene products and cash donations are accepted. A tax receipt will be issued for donations of \$10 or more.

Please make your cheque payable to the Community Christmas Hamper Campaign and send it to: Community Christmas Hamper Campaign, c/o Jeffery Hale Community Services, 1250, chemin Sainte-Foy, Québec (Québec) G1S 2M6.

Make a Difference

If you are interested in learning how you can make a difference in our community or want to be a Partner organization in the Planned Giving Program, please contact Nectaria Skokos, at the Jeffery Hale CommunityPartners, nskokos@jhpartners.net or by phone at 418-684-5333, ext. 1517.