



Protect Someone's Tomorrow with a Gift in Your Will to MedicAlert Foundation Canada

Continue your Impact for Generations to Come

You've supported MedicAlert Foundation Canada throughout your lifetime. A gift in your will allows you to continue that support—ensuring that no one is alone in their time of need, even in the future.

It's a simple and powerful way to make a lasting difference, while remaining fully in control of your assets today.

Why This Gift

A gift in your Will—also known as a charitable bequest—is one of the most flexible and accessible ways to give.

It allows you to:

- Make a meaningful future gift without affecting your finances today
- Leave a larger contribution than may be possible during your lifetime
- Support the people and causes you care about in a lasting and intentional way

Benefits to You



Simple

Easy to arrange through your lawyer or estate planner



Flexible

Choose a specific amount, a percentage, or the remainder of your estate



Tax-Smart

Helps reduce taxes owed by your estate



Cost-Effective

Does not impact your current income or financial security



Control

You retain full use of your assets during your lifetime



Adaptable

You can update your Will at any time as your circumstances change



Recognized

We can honour your gift during your lifetime, if you choose



Meaningful

Create a lasting legacy for your family, community, or someone you wish to honour

How It Works

A charitable bequest is a direction in your Will that instructs your executor or trustee to leave a gift to MedicAlert.

When your estate is settled:

- Your gift is distributed according to your wishes
- A charitable tax receipt is issued for the full value of the gift
- Your estate uses this receipt to reduce taxes on your final return

If your gift exceeds 100% of your net income in the year of death, the tax credit may be applied to the previous year or carried forward through your estate.

How to Start

1. Speak with your lawyer or estate planner about including MedicAlert in your Will
2. Decide on the type and size of gift that aligns with your goals
3. Consider sharing your intentions with us—we would be honoured to recognize your commitment

We strongly recommend seeking professional advice to ensure your plans reflect your financial and personal wishes.

Ways to Structure Your Gift

You can choose the option that best reflects your intentions:

A specific gift

A fixed dollar amount

A percentage gift

A portion of your estate

A residual gift

The remainder of your estate after other commitments are fulfilled

You may also choose to direct your gift toward a specific purpose or allow it to be used where the need is greatest.

Legal Information

To include MedicAlert in your Will, please use our full legal name:

Canadian Medic-Alert Foundation Incorporated
895 Don Mills Road, Building #2, Suite #405, Toronto, ON M3C 1W3

Suggested Wording

You may wish to share the following language with your legal advisor:

Unrestricted gift (fixed amount)

I give, devise and bequeath to **Canadian Medic-Alert Foundation Incorporated** the sum of \$_____ to be used for any purpose approved by the Board of Directors.

Restricted gift (with flexibility)

I give, devise and bequeath to **Canadian Medic-Alert Foundation Incorporated** the sum of \$_____ to be used for the following purpose(s): _____. If the funds cannot be fully applied as intended, they may be used for other purposes approved by the Board of Directors.

Residual gift (percentage)

I give, devise and bequeath ____% of the residue of my estate to **Canadian Medic-Alert Foundation Incorporated** for any purpose approved by the Board of Directors.

Let's Continue the Conversation

If you are considering a gift in your Will, we would be pleased to speak with you.

You can also let us know if you've already included MedicAlert in your plans so we can thank you and ensure your wishes are understood.

Call: 1-800-668-1507

Email: legacygiving@medicalert.ca

Visit: medicalert.ca/planned-giving

Your gift helps ensure that MedicAlert can continue to protect Canadians in their most vulnerable moments—today, tomorrow, and for generations to come.

