



# Protect Someone's Tomorrow with an Endowed Gift to MedicAlert Foundation Canada

## Create a Legacy that Lasts Forever

You've supported MedicAlert Foundation Canada throughout your lifetime. An endowment gift allows you to extend that support far into the future—providing lasting, reliable funding for generations to come.

It is one of the most enduring ways to ensure that Canadians are never alone in their time of need.

## Why This Gift

An endowment gift is invested permanently, with only the income used each year to support MedicAlert's work.

It may be a good option if you:

- Want to create a lasting legacy
- Value long-term, sustainable impact
- Wish to honour yourself, your family, or someone important to you
- Want your gift to support MedicAlert year after year

## Benefits to You



### Enduring

Your gift continues to make an impact in perpetuity



### Impactful

Provides ongoing support year after year



### Tax-Smart

Eligible for a charitable tax receipt that may reduce taxes



### Recognized

Opportunity to create a named fund in your name or in honour of someone



### Meaningful

Create a lasting legacy aligned with your values



### Transformational

Supports both current needs and future innovation

## How It Works

An endowment gift is invested, with the principal preserved and the income used annually to support MedicAlert's mission.

Your gift helps ensure:

- Ongoing, stable funding for essential services
- Continued innovation to support Canadians living with complex medical conditions
- Long-term sustainability of MedicAlert's life-saving work

A charitable tax receipt is issued for the full value of your gift. Your estate may use this receipt to reduce taxes owing 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.

## Creating a Named Fund

For gifts of \$100,000 or more, you may choose to establish a named endowment fund.

- Named in your honour, your family's name, or in memory of someone important
- Invested alongside MedicAlert's assets
- Annual reporting provided to you or your family

## How to Start

1. Speak with your financial advisor or broker
2. Request a transfer of securities directly to MedicAlert's brokerage account
3. Complete any required documentation, including a securities transfer or intent form
4. Notify MedicAlert so we can confirm receipt and recognize your gift

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

## Suggested Wording

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

I give to **Canadian Medic-Alert Foundation Incorporated** the sum of \$\_\_\_\_\_ to be used to establish a named endowment fund. The principal shall be invested and identified as the (Name of Fund). The annual income, less applicable fees, shall be used for the following purpose(s): \_\_\_\_\_.

## Let's Continue the Conversation

If you are considering an endowment gift, we would be pleased to speak with you.

You can also let us know if you've already made arrangements so we can thank you and ensure your wishes are understood.

**Call: 1-800-668-1507**

**Email: [legacygiving@medicalert.ca](mailto:legacygiving@medicalert.ca)**

**Visit: [medicalert.ca/planned-giving](https://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.

