

Planned Gifts



**Open
your heart.
Give for life.**



Kathy Yemenidjian
congratulates a colleague
on a successful procedure.

From its first beat to its last, our heart will go through a great deal in our lifetime—good and bad, happy and sad. Every year, the Montreal Heart Institute watches over the hearts and health of thousands of Quebecers. But we couldn't do it without big-hearted people like you. By planning a gift or making a donation today, you allow us to offer precision medicine to each and every patient while helping to build the Institute of the future.

By opening your heart to the Foundation, you'll be making a true difference in the life of a loved one, a friend, a colleague, or a neighbour, as well as giving your own life renewed purpose. But above all, you'll be giving a future to those with hearts in need. Thanks to you, they'll have the strength to enjoy everything life has yet to offer.

“The excellence and expertise of the Institute’s teams are world-renowned. Thanks to the Foundation’s support, we have access to the latest technology, which raises the level of care we provide. With the generosity of donors, we’re able to offer patients personalized solutions by adapting treatments and therapies so that every person benefits from the very best that medicine has to offer.”

Dr André Denault

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Anesthesiologist and
Intensive Care specialist
at the Montreal Heart
Institute

Give with heart, your way

Making a planned gift is easier than you might think. It's really just another way of giving, either now or in the future, with some preparation. You don't need to be a financial expert, and you don't need to be wealthy. All you need is the desire to leave a legacy that will help sustain the Institute into the future and heal thousands of hearts. Whether your goal is to leave your mark, honour a person close to you or show gratitude to the Institute, your donation will help save lives and give renewed purpose to your own.

Making a planned gift also means that the Foundation will guide you through the process, to help you choose the option that makes the most sense for your personal, family and financial situation, and ensure that you feel confident every step of the way.

“ Making a planned gift to the Foundation is a great way to show your generosity, as it benefits both the Institute and your financial portfolio. It means stretching the impact of your donation, further contributing to the wellness of patients and caregivers alike.”

Louis A. Tanguay

-

Member of the
Foundation's Board of
Directors and donor

Gift of shares

Planning a gift of publicly traded securities is a great way to express your generosity to the Institute today. This strategy means you can increase the amount of your donation without changing your current standard of living.

Gift of life insurance

Making a donation with a life insurance policy is an accessible way to show that the Institute holds a special place in your heart. This type of gift offers several options and affords you the opportunity to have a significant impact on the future, while ensuring that your loved ones can enjoy the legacy you leave for them.

Bequest

Leaving a gift in your will is an easy way to leave your mark and extend your commitment to the Institute. With this type of donation, you'll leave behind a legacy that transcends the present and keeps your memory and your values alive in perpetuity. A bequest may also help reduce the tax burden on your estate, allowing you to give back and depart with peace of mind.

“Twenty years ago, I had bypass surgery at the Institute. My father was cared for there as well. The Institute is part of our family history. It’s a source of deep pride to see its international reputation grow. The care teams are extraordinary. That’s why I decided to make a gift of shares— thanks to the tax receipt issued, I was able to give even more.”

Jules Landry

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Patient at the
Montreal Heart
Institute and donor

Gift of shares

You're grateful for the important work done by the Institute and wish to make a concrete gesture to continue supporting the evolution of research, teaching, preventive medicine, and patient care. You hold publicly traded securities and want to maximize the impact of your gift because you know your donation will help change lives.

A gift of securities is a tax-effective option that allows you to make a larger donation than if you were to make a cash donation. You won't have to pay a capital gains tax on the donated securities, and you'll receive a tax receipt for the full market value of your shares at the time of transfer.

A gift of shares is a smart way to support a cause that's dear to your heart.

- You'll maximize the value of your donation because the capital gains on your shares aren't taxed.
- Your donation will have a direct impact on the lives of thousands of people.
- To make a gift of shares, speak to your financial advisor, fill out our form and contact us so we can follow up.

“Every day, I see how much we mean to Quebecers. At the Montreal Heart Institute, we don’t treat the disease, we treat the person. When people come here, they know that their heart is in the very best hands. Life has been kind to me. I’m healthy. Naming the Foundation as a beneficiary of my life insurance policy is my way of saying thank you.”

Catherine S.

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Employee at the
Montreal Heart
Institute and donor

Gift of life insurance

You believe in the Institute’s mission and want to help it succeed. You already have a life insurance policy or are thinking about buying one, and now know that it’s possible to use your policy to make a gift that conveys the respect and gratitude you have for the Institute.

A gift made with a life insurance policy allows you to leave a meaningful legacy—one that reflects your values and is extremely worthwhile. This type of donation is flexible and offers several options, such as adding the Foundation to your list of beneficiaries, like you would for a family member, or even transferring ownership.

Regardless of the option you choose, the gesture you make today will ensure a future for hearts in need.

- You'll leverage the value of your donation and, depending on the option you choose, either you or your estate will receive a tax receipt.
- You are guaranteed to leave your mark by making a memorable gesture that will contribute to building the Institute of the future.
- To make a gift with a life insurance policy, speak to your insurer and contact the Foundation so we can help you through the next steps.

“For more than 20 years now, we’ve been receiving care at the Montreal Heart Institute from highly skilled, conscientious doctors who really listen. The Foundation is there to advise us, guide us and answer our questions. By choosing to leave a gift to the Institute in our will, we know our money will be put to excellent use.”

Louise Chandonnet
and Leonard Travis

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Patients at the
Montreal Heart Institute
and donors

Bequest

The Institute has played an important role in your life or that of a loved one, and you want to ensure it can continue to do the same for future generations. You want to include the Foundation in your will because the Institute has changed the course of your life, and you want to help change thousands more.

A gift in your will is a simple way to write your own story and leave your mark on the history of the Institute. It's a way of saying thank you in a meaningful way, regardless of your current financial situation, while reducing the tax burden on your estate.

This type of gift affords you the opportunity to give to a cause that's close to your heart, plan a legacy that reflects who you are, and depart with peace of mind.

- A legacy gift can be changed or reversed at any time, and your estate will receive a tax receipt for the value of your gift.
- The legacy you leave will help save thousands of lives.
- To make a bequest, add a clause to your will to specify the gift you wish to leave and then contact the Foundation to inform us of your intentions.



M. Robert Blouin
is ready for
the next day's
bypass surgery.

A most heartfelt thank you

A planned gift is the culmination of a process that is at once emotional and purposeful. By opening your heart to us today, you'll not only be offering a future to Quebecers with hearts in need, you'll also be making a gift that will have an enormous impact on the future of the Institute. On behalf of everyone who will one day benefit from your generosity, a most heartfelt thank you.

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