

# Planning for Kids

*SickKids Gift Planning Newsletter*

**SickKids**<sup>®</sup>  
FOUNDATION

## Building a research legacy

Tim Hockey is the president and CEO of TD Canada Trust. He is also the Campaign Chair for the new capital campaign to raise \$200 million to build a new Research & Learning Tower for The Hospital for Sick Children (SickKids). The campaign, launched in May 2010 has raised more than \$30 million in commitments to date and is in need of donor support to reach the \$200 million goal. Recently we asked Tim what legacy means to him.

In 1998, my wife Lana and I welcomed our daughter to the world at a hospital in London, Ontario. Our excitement of her birth was marred as it became clear all was not well. No one in Canada could diagnose her and we ended up going to Johns Hopkins to ultimately learn she had a rare genetic condition known as Neonataladrenoleukodystrophy.

A few days after her second birthday, she passed away. For many years, it was too difficult to get involved with anything related to children's health. However, I set a goal to get involved down the road by devoting more time, energy and money to the cause. I wanted to make sure other Canadian families would not have to leave the country to find the care their child needed.

What I went through with my daughter was a life changing experience, one that led me to join SickKids Foundation's Board of Directors and more recently become Chair of the Research & Learning Tower Campaign. This experience has taught me that research and clinical care are inextricably linked.

The new Tower will shorten the distance between the bench and the bedside and bring specialists, doctors and researchers to SickKids to help ease the burden these diseases put on families. I'm proud to be a part of this and hope to make it part of my personal legacy.

Many people don't know that the SickKids Research Institute was established by a single gift left by J.P. Bickell in his will. That single gift propelled what today is the largest hospital-based research facility in Canada and one of the largest in the world carrying out research in a broad range of fields led by some of the world's top scientists. We can all make such a difference.

It is my goal to help move this project forward brick by brick and build upon what will be a significant landmark and addition to the continually growing SickKids legacy. The team leading the Campaign is extraordinary. Like me, they want to look back on their lives and know they made a real difference to the state of health care for children in Canada.



## Barbara Male

Barbara Male had a long and multi-faceted connection to SickKids. As a young child she received surgery at SickKids to correct a club foot. Later in life, she returned to the Hospital in an entirely different capacity. Interested in giving back to the Hospital she had been treated at as a child, Barbara worked as a clerical support worker at SickKids from 1957 to 1991. When Barbara passed away in December of 2009, she continued her SickKids legacy by leaving a quarter of her estate to the Hospital.

Those who knew her weren't surprised to learn of her generosity as she had spent her life giving back to others and donating to various charities dear to her heart. In addition, she was a great neighbor and friend always lending a hand to those who needed help.

An active member in her community, Barbara was fond of bowling and playing euchre with the King City Seniors. Barbara was also an animal lover and always had a pet companion by her side.

"Barbara was constantly giving back to others," said Jon, Barbara's friend and executor of her will. "She spoke very fondly of SickKids and I am not surprised that she left a legacy behind to extend on a lifetime of generosity and continue her connection with a place that had a strong impact on her life."

The impact of Barbara's gift will resound over time just as her connection to the Hospital impacted her over a lifetime.



**Barbara Male had a long and multi-faceted connection to SickKids. As a young child she received surgery at SickKids to correct a club foot.**

### STOCK DONATION STRATEGY

As the holiday season and end of year approaches many of us consider our annual charitable donations. As you think about how you will structure your charitable gift this year, have you considered a gift of shares?

Donating stock, particularly long-held shares with accumulated capital gains such as BCE or Royal Bank,

is one of the most cost effective ways to donate to SickKids.

Typically, when you sell appreciated stock (including mutual funds), you are required to pay tax on 50% of the capital gain. However, if you donate the stock, there is no capital gains tax owing and you receive a charitable tax receipt which will help offset other taxes.

Now, what if you could use shares to accomplish three worthy goals; a gift to SickKids, elimination of taxes and retaining funds for your personal use, would you?

Please contact us to learn more about this option.



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## Thomas J.B. Freeman

Born the eldest of five children in Saskatchewan in 1913, Thomas (John) J.B. Freeman's life spanned world wars, depressions, technological advances, personal feats and accomplishments much like others of his generation. Also much like others of his generation he spent his life as a working-class family man teaching his children the value of a dollar and a good education.

"My father worked as a gardener. He was a hard worker and a modest spender," explains Lorne Freeman, the youngest of John's two sons. "He gave to various organizations and charities throughout his life and showed us the value of philanthropy."

John's philanthropic teachings continued when he passed away. His family was surprised to discover that he designated a third of his estate to charities, the largest recipient being SickKids. His granddaughters, Rachel and Allison, were most touched that their grandfather gave so generously to charity.

John's connection to SickKids started with the birth of his second son, Lorne, who required surgery the day he was born and follow-up surgery as a toddler. The association continued when both of his sons received appendectomies at SickKids as children.

"My father was a private man," continued Lorne. "There was an obvious link to SickKids, but none of us had any idea just how powerful that connection was and how important the Hospital was to him. We were all touched by his generosity."

Over his lifetime, John donated to SickKids in modest amounts. These amounts, combined with his bequest, dedicated to high priority areas in the Hospital, added up to a very significant total that will impact the lives of many individuals associated with SickKids from patients to doctors to researchers.

## THE IMPORTANCE OF HAVING A CURRENT WILL

Have you got around to making or updating your will? For many reasons, you should consider reviewing your estate planning periodically:

- Life is not static
- Beneficiaries and executors may move or pass away
- A new marriage (which revokes a will executed prior to the marriage)
- Additions to the family
- Changes in assets
- Changes in wishes

While having a will is important, it is also vital that it be up-to-date, well drafted and, most importantly, valid to ensure that you protect your life assets.

If you have already made a gift in your will to SickKids, we appreciate your thoughtful generosity! Please let us know about it so we can thank you personally and ensure that your wishes are realized many years from now.

# A word from the gift planning team

Welcome to our first edition of the updated Planning for Kids – we have a new look for our newsletter, one that reflects our creed: *Healthier Children. Your legacy for a better world.* We hope you like this change!

One thing that hasn't changed is the tremendous impact that people coming together for a common cause can have on their community. The stories of Barbara Male and John Freeman illustrate this power and serve as excellent reminders that you too can make an impact. You have the power to create a meaningful legacy – now and in the future.

Everyone has their own reason for giving. It is my ongoing honour to meet with donors and learn of their personal motivations. So often I hear how having created their plans, donors feel a great sense of accomplishment and peace knowing that they have ensured a better future for the next generation.

Our team in the Foundation is here to support you in your planning. Your inquiry will be treated with the utmost confidentiality. Thank you for considering including SickKids in your estate plans. When you do, we hope you will share your decision with us so that we can express our gratitude today.

Thank you for your support,



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**SickKids**<sup>®</sup>  
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## BEQUEST INFORMATION

Do your estate plans include SickKids Foundation? Let us know! If you plan to make a bequest to The Hospital for Sick Children (SickKids), the name you should include in your will is “**The Hospital for Sick Children Foundation**”. The Foundation is the Hospital’s parallel charity, which raises money, performs estate administration and manages the endowment of behalf of the Hospital.

Planning for Kids is a charitable gift planning newsletter published biannually by SickKids Foundation. The information provided is general in nature and not intended to be a substitute for professional legal and financial planning advice. The Foundation encourages donors who are planning a significant donation to seek legal and financial planning advice.

SickKids Foundation respects the privacy of its donors; we do not sell, rent or trade our donor lists. The information we collect is used to process donations, keep our donors informed about the activities of the Hospital and Foundation, and ask for their support for our mission to improve children’s health. If at any time you wish to be excluded from future contacts, or to discuss our privacy options, please call us at 416.813.8271.

We invite you to share your comments and ideas with us. If you have an idea for a story or would like to make a general comment of suggestion about the contents of the newsletter, send an e-mail message to [gift.planning@sickkidsfoundation.com](mailto:gift.planning@sickkidsfoundation.com) or call 416.813.8271.

Front cover photo: Joey (8) has an infectious spirit and a rare gift for making others feel at ease. He is also a patient at SickKids. For more information on Joey, please visit [www.sickkidsfoundation.com](http://www.sickkidsfoundation.com)