GUEST SPEAKERS

Dustin Eckstrand is an Investment Advisor with RBC Dominion Securities. With 14 years experience in financial management, corporate operations, accounting, and small business, Dustin can guide you down the path of Estate planning.

Chris Warren is one of three founding partners of Warren Sinclair LLP. With over 40 years experience in law, Chris is the legal advisor for Red Deer Regional Health Foundation and practices in a number of areas including wills, estate planning, and trusts.

LeRoy Leenstra is a chartered professional accountant and has over 24 years experience including estate planning, succession planning, and more. LeRoy is a partner at BDO Canada LLP.

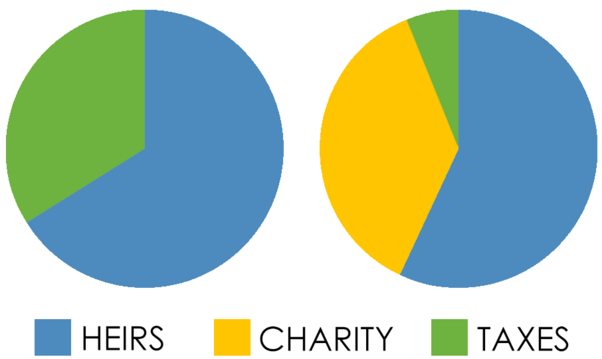
Eric Colberg is a senior manager with BDO Canada LLP. Eric delivers srong solutions in areas of estate planning and will help develop a strategy that minimize overall taxes.

WHAT'S BEING COVERED?

- Leaving a gift in your will to a Foundation and decide whether to leave an exact dollar amount or a percentage of your estate.
- Using investments that have increased in value, such as mutual funds or publicly trades stocks for your legacy gift.
- Naming a Foundation as the beneficiary of your RRSP, RRIF or pension plan.
- Naming a Foundation as a beneficiary of an existing life insurance policy or purchase a new life insurance policy and name a Foundation as the beneficiary.
- Honouring a loved one through your legacy gift.
- Setting up a charitable gift program.

Why give to a charity in your estate plan?

No Charity vs. Charity



Outcomes vary depending on circumstances. Please consult professional advisors to discuss available opportunities.

WHO CAN HELP?

In order to assist you with your planning, please fill in the following:

○ **I am considering** a provision through my estate for the Foundation

○ **I have already** made a provision through my estate for the Foundation

○ I have a specific question regarding:

____

○ I wish to meet/speak with a Planned Gifts representative

Name: ______________________________

Address: ______________________________

Town/City: ______________________________

Prov: ____________ Postal Code: ____________

Phone: ______________________________

Email: ______________________________

Please tear this page and hand it to the Foundation representative or mail to

Red Deer Regional Health Foundation
3942-50A Ave
Red Deer, AB T4N 4E7

FEEDBACK

Your opinion is important to us. To help us plan future seminars, we value your feedback:

Was the information helpful?

Did you enjoy the Speakers?

What did you learn/love?

How was the length of the seminar?

How did you hear about the seminar?

What other topics would you like to see covered?

THANK YOU

Thank you for attending and considering Red Deer Regional Health Foundation in your end of life planning.

Feel free to contact our advisors below if you have any questions.

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WILLS & ESTATE PLANNING SEMINAR

A workshop about planning for the future

September 24, 2019

Red Deer Regional health foundation

Your Hospital, Your Health: Our Mission