



Mackenzie Forbes Society

Making plans today to give each child the brightest future



“Joan always said the Montreal Children’s Hospital was one of the best in North America, and she was right.”

BOB KOURI



Thank you

By Renée Vézina, President

During these difficult and uncertain times, we are especially grateful for the support of loyal donors like you. Your support helps to provide our most fragile patients with outstanding pediatric healthcare, both now during the current crisis, and in the future.

One sick child affects at least six lives. Hospitalizations, appointments with doctors and other specialists, school absences, siblings’ distress, cancelled plans and financial uncertainty are some of the many challenges young patients and their families face time and again.

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Completely Devoted

Twenty-five years is a testament to one’s devotion. Joan Kouri worked 25 years at the Montreal Children’s Hospital and they were among the most rewarding in a long and productive life. Her husband, Robert, knows this well.

Robert and Joan Kouri met at McGill University and were married in 1955. They were together for 63 years. Robert was a teacher and later became a school principal and administrator. Joan graduated with a Master’s degree in education. One of her first positions was as a remedial therapist in the Department of Psychiatry at the Montreal Children’s Hospital. It was a role she came to love.

Joan helped children overcome learning disabilities such as attention deficit disorders, dyslexia, and dyscalculia (difficulty with numbers). She found it immensely satisfying. Not only did she help children with learning problems, she also helped them cope with the severe emotional challenges that often accompany these conditions. Joan’s years at the Children’s left her with lasting admiration and respect for the hospital and all that it does.

According to Robert, “Joan always said the Montreal Children’s Hospital was one of the best in North America, and she was right”.

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Saving and Giving — With a Will

People's ideas differ about many things – and that includes money.

Some believe in careful spending and saving. They want to build a nest egg for when they retire and ensure that loved ones are protected in the future. Others prefer to enjoy their money as they go along and to keep their estate minimal. There is no right or wrong way of doing things.

Whatever your experience, one thing is certain – having a will is essential to your long-term financial wellbeing. A will distributes your lifetime assets. Everything you own – real estate, furniture, stocks, bonds, retirement funds, life insurance policies – is given a dollar figure, which is added to your income in the year of death to calculate the value of your estate.

Your will is also a statement of who you are and what is important to you. It reflects the ongoing stewardship of your resources and the legacy you wish to leave behind. Through your will, you may provide for the people you care about and invest in the causes you feel passionate about – including the Montreal Children's Hospital Foundation.

Sometimes there is concern that a legacy gift will reduce the amount you plan to leave to your loved ones. That does not have to happen. With a good estate plan you can achieve your philanthropic goals while keeping your loved one's future stable

and secure for years to come. Another common misconception is that only those who can leave large amounts should consider a gift in their will. In fact, a gift of any amount can make a real difference in the life of a child who is ill. The thoughtful intention behind the gift matters more than the amount.

The Montreal Children's Hospital has been a recognized leader in pediatric health care for 115 years. It currently provides highly specialized care to 63% of the geographic area of Quebec with a focus on family and patient-centred care. Everyone who leaves a gift for the hospital is helping to ensure that it continues to offer caring and innovative health care long into the future.

THANK YOU! Members of the **Mackenzie Forbes Society** have made a legacy gift to the Children's through a bequest, a charitable annuity, a gift of life insurance or by establishing an endowment. We are extremely grateful to these donors for helping to ensure the best pediatric care for future generations of young patients. Dr. Alexander Mackenzie Forbes founded the Montreal Children's Hospital in 1904 and served as its Surgeon-in-Chief until 1929.

Shape the future through your estate



Legacy or planned gifts are an important part of our philanthropic tradition. Each year, thousands of Canadians like you support many worthwhile causes through legacy gifts - gifts that may not be financially possible during one's lifetime.

Such gifts can generate tax savings for your estate. They can also help the Montreal Children's Hospital face the future with confidence, by providing it the financial security to continue to offer novel techniques and treatments and stay at the forefront of world class pediatric health care.

It's easy to make a gift through your will and there are different types of gifts from which you may choose, including:

SPECIFIC GIFT

The Montreal Children's Hospital Foundation receives a specific asset, such as a named amount of cash or an identified parcel of real estate. For gifts of securities, it is best to give your liquidator the

power to choose what should be donated rather than naming any security specifically. This enables better tax planning and precludes the possibility of the gift lapsing in the case that the securities named have been sold.

RESIDUAL GIFT

The Montreal Children's Hospital Foundation receives all or a percentage of what remains in your estate after other special provisions have been fulfilled.

CONTINGENT GIFT

The Montreal Children's Hospital Foundation receives all or a percentage of your estate after other named beneficiaries have died.

A properly drafted will is essential. Without one, the provincial government will decide how to distribute your assets and, the court or the heirs, will appoint the liquidator of your estate. As a result, your preferences may not be respected. This is especially true if you wish to remember people beyond your immediate

family or to support charities that are important to you.

It is important to have your will prepared by a lawyer, or notary in Quebec, or through a trust company with a notary's help. It is also important to consult a professional (lawyer, notary, accountant or financial advisor) for a better planning of your estate and to maximize your tax savings. Let your loved ones know exactly what you have done and your reasons why. You should review your will regularly - every three to five years and on certain milestones of your life - to make sure that its contents still reflect your wishes.

If you are considering any type of estate gift, please contact Samar El Soufi, at 514-934-4846, ext. 29226, sels@mchf.com who would be happy to help you. Rest assured that respect, confidentiality and attentive listening are guiding principles in everything we do.

Thank you

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Your thoughtfulness and support provides them with a lifeline to hope and possibility.

Your generosity is perhaps more vital now than ever before as the pandemic highlights the need for new treatments and ground-breaking innovations in patient care, research and equipment. Current circumstances have taught us how important it is to stay united and help those who are most vulnerable. The need could be today, tomorrow, next year and beyond. With your help, we can always be ready.

As a loyal donor, we are pleased to share with you this inaugural edition of the MacKenzie Forbes Society newsletter which we hope will give you useful information on enduring and forward thinking ways to support the Children's.

Thank you for being a partner in our mission to find unexpected ways to heal. We are truly stronger together.



Completely Devoted

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Each child is welcomed with open arms. The staff is highly skilled, and genuine. They always put the needs of children first. Time and time again, Joan saw how the hospital helped children through serious medical and emotional difficulties and transformed their lives.

That's why Robert and Joan became annual donors. For over thirty years, they made numerous small gifts to the Foundation, many in honour of hospital staff.

When the time came to do their wills, it was an easy decision to include the Montreal Children's Hospital Foundation as a beneficiary in their estate.

"The hospital was top of the list for organizations we wanted to remember," says Robert. "We decided that the surviving spouse would leave a percentage of our estate to the Department of Psychiatry to be used where the need is greatest." Knowing the Children's as well as they did, the couple was confident that their legacy gift would be used effectively and according to their wishes.

Since Joan's death in February 2018, Robert's support of the hospital has continued, and he

strongly encourages everyone to remember the Montreal Children's Hospital Foundation with a gift in their own estate plans. Robert is clear, "The hospital does outstanding work with the sickest children in the most distressing situations. A legacy gift of any amount will help our hospital continue to provide excellent pediatric healthcare for our community and beyond."

Please join the Kouris and remember the Montreal Children's Hospital Foundation with a legacy gift in support of the most urgent needs of the Hospital. If you have already remembered the Montreal Children's Hospital Foundation in your will please be so kind as to inform the foundation staff. They would like to thank you personally and ensure your will is worded in such a way that your gift will be used exactly as you would like. They will also be pleased to discuss options to recognize your support or respect your wishes should you prefer to remain anonymous.

To Robert and Joan Kouri, thank you for your many years of loyal and generous support of the Montreal Children's Hospital, and for your thoughtfulness in continuing this support well into the future.

