



*in flight for your life*  
*today... and tomorrow*



***PLANNED GIVING***





# ***Everyone deserves to have peace of mind.***

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HALO provides critical, life-saving services to those in emergency situations, often in remote and inaccessible areas.



## ***Why Give?***

Your generosity has the power to change lives, and through thoughtful planning, you can extend your impact far beyond your lifetime. We believe that every individual has the opportunity to create a legacy of hope, compassion, and urgent, life-saving care. This booklet is designed with you in mind—to help you explore the ways your values and philanthropic vision can ensure that HALO continues to provide critical emergency services to those in need, now and for generations to come.

Your legacy is our future, and together, we can make a lasting difference.

## ***What is a Planned Gift?***

Planned Giving is more than a donation; it's a testament to your values and a commitment to the well-being of future generations.

This type of gift can be established without impacting your current financial circumstances, allowing you to make a lasting difference in the lives of those we serve. It often involves financial or legal instruments such as Wills, life insurance policies, endowments, and trusts, providing a structured and thoughtful approach to philanthropy.

HALO Air Ambulance strongly encourages all individuals considering a planned gift to consult with their financial advisor, estate planner, or legal professional. We do not provide legal or financial advice, and decisions regarding your estate should be made in consultation with qualified professionals to ensure your wishes are fully respected.

## ***Our impact***

**50,000**

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Square Kilometer  
Response Area

**52**


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Southern Alberta  
Communities Supported

**Countless**

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Lives Impacted by HALO  
Missions

A photograph of a man and a woman embracing in a field of tall grass and sunflowers at sunset. The sky is filled with soft, golden light and scattered clouds. The couple is seen from behind, with the man's arms around the woman's shoulders.

**“I am grateful for everything HALO was able to do for my family and I. They got to me so fast...and saved my life.”**

**- Christine, HALO Very Important Patient**

# Benefits of a Planned Gift

## ***Support Loved Ones & Reduce Estate Taxes***

By making a charitable donation, you can provide for your loved ones while reducing or eliminating estate taxes.

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## ***Reflect Your Values***

Establishing a meaningful legacy through planned giving reflects your values and leaves a lasting impact. Your decision to support HALO shows your commitment to accessible emergency care in Southern Alberta.

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## ***Inspire Others***

Sharing your plans with family members and close ones can inspire them to give and help instill a sense of philanthropy in future generations.



## ***Making a gift in your Will***

When you leave a gift through your will, your estate receives a tax receipt for the full value of the gift. This tax receipt provides a credit on your final income tax return, which can help maximize the value of your residual estate for your beneficiaries.

To start preparing your Will, or to add a simple change to your existing Will, contact your financial advisor, estate planner, and/or lawyer.

Ensure your wishes are carried out by using the following wording in your will:

### **Specific Bequest:**

"I give to HALO Air Ambulance Society, the sum of (\$amount)."

### **Residue of Estate:**

"I give all (or \_\_\_% of) the residue of my estate to HALO Air Ambulance Society."

### **Gift Designated for a Particular Purpose:**

"I give (please state a specific amount; or, a sum or percentage of the residue of the estate) to HALO Air Ambulance Society to be used for a purpose related to or benefiting (insert specific purpose)."

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## ***Talk with Your Loved Ones***



Discuss your wishes and plans with your family to assure them of your support and share your family's community and philanthropic values. Please let us know of your decision to make a gift to HALO to help us plan the future use of those funds most effectively. We respect all requests for confidentiality and anonymity.

# ***HALO Agency Endowment Fund***



HALO has an established Agency Endowment Fund with the Community Foundation of Medicine Hat and Southeastern Alberta. By contributing to the HALO Agency Endowment Fund, you're making a meaningful impact on our ability to serve your community, now and in the future.

How to donate to HALO's Agency Endowment Fund:



<https://www.canadahelps.org/en/dn/73592>

- **Online:** Visit the webpage by scanning the QR Code:
- **By Mail:** Send a cheque to the Community Foundation of Medicine Hat and Southeastern Alberta, specifying in the memo line that your donation is for the HALO Agency Endowment Fund.
- **In Person:** Visit the Community Foundation's office and specify that your donation is for the HALO Agency Endowment Fund.
- **Receive Acknowledgment:** The Community Foundation will provide you with a receipt for your donation, which can be used for tax purposes. Additionally, you will receive a thank-you from HALO if you wish to notify us of the gift.
- **Impact:** Endowments are forever. Your contribution to our Agency Fund helps provide ongoing support for HALO's critical services, ensuring we have the resources needed to continue this lifesaving work.

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## ***Life Insurance***

Name HALO as a beneficiary and your estate receives a tax receipt when the benefit is paid out. You retain the ability to change the beneficiary in the future if you choose. Reach out to your insurance agent for advise and guidance.



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# ***Shares and Other Securities***

Your gift of securities must be donated “in Kind” and provides an innovative and creative way to make a charitable gift and can often help fund a larger gift than you might otherwise be able to make. Shares include stocks, bonds, bills and mutual funds. It also offers you a tax-efficient way to support our mission while avoiding capital gains tax and possibly deducting the full value.

*Favorable tax rules regarding the donation of shares to a registered charity make this option particularly attractive for many donors.*



## ***Online Donation Process for Securities***



- Visit the webpage by scanning the QR code provided:
- Fill out the online form with some basic information about the shares/funds and some personal details for tax receipting purposes (i.e. full name, address).
- Download the “Letter of Direction” (CanadaHelps automatically produces)
- Sign the letter of direction and provide it to your broker/financial institution.
- Your broker/financial institution transfers the requested number of shares from the donor’s investment account to CanadaHelps’ account.
- CanadaHelps sells the securities on the day received from your institution, arranges the pledge documentation and materials for you, issues you a tax receipt, and transfers the proceeds to HALO

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## ***Charitable Remainder Trust***



A financial arrangement where a donor transfers assets into a trust, which then provides income to the donor or other named beneficiaries for a specified period. After this period, the remaining trust assets are donated to a designated charity, such as HALO Air Ambulance.

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## ***Learn More***

No matter what you want to accomplish with your gift, there's probably a way to do it. We encourage you to consult with your estate or financial advisor, lawyer, and accountant, when considering a planned gift. Professional guidance can also help you maximize the tax benefits of your gift.

Thank you for considering this meaningful way to support HALO Air Ambulance. Your gift will not only help sustain our mission but also inspire others to give, creating a ripple effect of generosity and hope.

## ***HALO Tax Information***


**Legal Name:** HALO Air Ambulance Society

**Registered Charitable Number:** 891538613 RR 0001

**Location:** #12 - Airport Drive SW, Medicine Hat AB, T1A 8C4

# Planned Gift Summary

There are many different types of Planned Gifts, and each offers unique advantages. The key feature of Planned Gifts like these is that they provide important benefits to you as well as HALO. Professional advisors like estate planners, lawyers, and accountants can provide guidance to ensure your gift works for you and your loved ones.

Types of Gifts	Your Gift	Your Goal	How You Make the Gift	Your Benefits
Leave a gift upon your passing	Your will or trust	Delay until the end of your lifetime.	Work with your attorney to add a gift or a percentage of your estate in your Will or living trust detailing your gift to HALO.	Maintain your current lifestyle while making a meaningful gift to support HALO.
	A beneficiary designation	Maintain control of your assets during your lifetime.	Designate HALO as beneficiary of a percentage of your retirement plan, savings or brokerage account, or life insurance policy.	Enjoy flexibility to change your plans as life changes.  Pass your retirement plan assets to HALO tax-free.
Gift with assets	Stock or other securities	Make a gift now and receive benefits.	Give stock or securities that have increased in value directly to HALO.	Qualify for income tax benefits.
	Real estate	Make a gift with little or no effect on cash flow.	Donate your residence, farm, or commercial property.	Avoid capital gains taxes on assets that have increased in value.
A flexible gift that pays income	Charitable remainder trust	Supplement your own retirement income or that of someone else.	Transfer cash, securities or other appreciated property into a charitable remainder trust.	Beneficiaries receive regular income payments from the trust for a set number of years or for life.  Receive a charitable tax receipt for the present value of the remainder interest that will eventually go to the charity.
A tax-efficient way to make a gift	Qualified charitable distribution	Make a gift now and receive current tax benefits. Maintain availability of the funds during your lifetime.	Designate HALO as a beneficiary of your RRSPs & RRFs.	Avoid paying income tax on the withdrawal by using funds from a retirement account to make a gift.
	A beneficiary designation			No Revenue Canada withholding tax on death.
"One-Stop" giving	Donor Advised Fund  	Simplify your charitable giving. Support HALO now and in the future.	Create a Donor Advised Fund or support HALO's endowment.	Qualify for an income tax deduction when you make a gift to the fund.
			Transfer cash or other assets, which are invested based on your preferences.  Grow your contributions tax-free. Advise which areas should receive your support.	Provide ongoing support to HALO.  Start a legacy of giving by letting your loved ones help decide which grants to recommend.

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### MY/OUR LEGACY

I/We, \_\_\_\_\_  
wish to be part of Halo Air Ambulance's future with a Planned Gift

I/We will provide for Halo Air Ambulance in my/our estate or deferred giving plans through a:

- |   |   |
|---|---|
| <input type="checkbox"/> Bequest in a Will  | <input type="checkbox"/> Gift of Real Estate                      |
| <input type="checkbox"/> Gift of Securities | <input type="checkbox"/> Gift of Life Insurance (existing or new) |
| <input type="checkbox"/> Other _____        |   |

The estimated value of this Legacy Gift is \_\_\_\_\_ (Optional and Confidential)

### PURPOSE AND INTENTION

*A HALO staff member may follow up with you to ensure that the purpose and intention of your gift is fully understood.*

- My/Our gift can be used to benefit HALO as soon as it is received.
- My/Our gift should be endowed in perpetuity, with all investment income disbursed annually in support of HALO

### CELEBRATING YOUR PLANNED GIFT

We are pleased to recognize the generosity of your Planned Gift and ask you to consider the following:

- I/We would like to learn more about the various recognition and stewardship opportunities as a Planned Gift Donor
- I/We would like the following name(s) to be used for all donor recognition purposes:  
\_\_\_\_\_
- I/We prefer to remain anonymous, but still wish to receive information and updates about HALO (Impact Newsletter, annual report, event invitations etc.).
- I/We prefer to remain anonymous and do not wish to receive future communications about HALO

### CONTACT INFORMATION

Donor Name	_____	Date of birth	_____		
Donor Name	_____	Date of birth	_____		
Home Address	_____	City/Prov	_____	Postal Code	_____
Primary Phone	_____	E-Mail	_____		

Donor Signature \_\_\_\_\_ Donor Signature \_\_\_\_\_

Name and contact information of your executor/lawyer/family member we may communicate with when your gift is received, to ensure your intentions are carried out and to share details about the impact of your gift:

\_\_\_\_\_

**If you have any questions, please contact us :**  
Phone: 403.528-9088  
Email: info@haloairambulance.com  
Visit: 557 18 St SW, Medicine Hat AB, T1A 8C4



***HALO Air Ambulance***

#12 - 1 Airport Drive SW  
Medicine Hat, AB T1A 5G4

Phone: 403.528.9088  
Email: [info@haloairambulance.com](mailto:info@haloairambulance.com)

[www.haloairambulance.com](http://www.haloairambulance.com)

Registered Charitable Number:  
891538613 RR 0001