



Benedictine Health Foundation's focus on programs for cancer patients, and people with behavioral health and substance abuse disorders, while continuing the legacy of the Benedictine Sisters' Spirit of Compassionate Care, is invigorating for those of us that love the Sisters and the work they have fostered in our community. There is no better way to establish your own legacy than by supporting their good work into the future.

- PAUL L. DELISIO



Benedictine
HEALTH FOUNDATION
Supporting the Benedictine Spirit of Compassionate Care

For more information about any of these charitable estate planning ideas or to explore other giving options, please contact:

**Benedictine Health Foundation, Inc.,
144 Pine Street, Suite 220, Kingston, NY
12401, (845) 481-1303 or via email at
breford@bhfoundation.org.**

**Benedictine Health
Foundation, Inc.**



**LEGACY
SOCIETY**

*A Legacy of
Compassionate Care*



Benedictine
HEALTH FOUNDATION
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The Legacy Society of the Benedictine

Health Foundation is made up of donors who have provided for the Foundation in their estate plans. The Legacy Society recognizes the generous intentions of our most forward-thinking, philanthropic supporters. We extend our deep appreciation to those who have chosen the Benedictine Health Foundation's mission of compassionate and spiritual care as well as financial and emotional support to those in need as their personal legacies. These gifts will help ensure our future and will stand as a tribute for generations to come.

Joining the Legacy Society is simple. Establish any of the following estate plan gifts, and you will qualify for membership:

- **Name the Benedictine Health Foundation in your will or living trust**
- **Designate the Benedictine Health Foundation as a beneficiary of your retirement plan**
- **Establish a planned gift that provides lifetime income for you and/or your spouse**
- **Make the Benedictine Health Foundation the beneficiary of your life insurance policy**
- **Create a memorial fund**

The Benedictine Health Foundation will ensure that your wishes are followed and that your generosity will have a lasting effect on the Benedictine Health Foundation and the communities that it serves.

We plan to honor Legacy Society members by featuring a list of member names in printed material, including the annual report and newsletter, as well as invitations to special events, and on the web site.

Ways of Giving

Bequests are provisions in your will or revocable trust that designate how your assets will be distributed after your lifetime. Charitable bequests can eliminate or reduce federal estate tax and are among the most flexible ways of giving because you have the option of changing your mind at any time. Bequests can designate a specific dollar amount or specific item or can be expressed as a percentage of your residuary estate (see the illustration to the right).

Beneficiary Designations. Simply designating the Benedictine Health Foundation as a beneficiary of your retirement plan, insurance policy, or financial account is one of the easiest ways to realize your charitable goals while continuing to enjoy the benefits of your assets during your lifetime. You may also benefit from significant tax savings by avoiding both estate taxes and income taxes in your estate. As with bequests, you may change your mind at any time.

Lifetime Income Gift. There are several ways to make a gift to the Benedictine Health Foundation and receive a fixed income stream from the gift principal for you and/or your spouse. This method of giving always includes an irrevocable transfer of the gift principal, an agreement detailing the income you and/or your loved one will receive, and various tax benefits including an income tax deduction as well as avoidance of both capital gains and estate taxes.

Suggested Language

Arranging for a gift through your will or living trust is simpler than many think. Below is typical language, with several options commonly used. You may find that one of them fits your estate planning goals:

I give to the Benedictine Health Foundation, Inc., a nonprofit organization incorporated in the State of New York (Tax ID: 22-2243537) with its principal offices at 144 Pine Street, Suite 220, Kingston, N.Y. 12401:

- the sum of \$_____, to be used where it is needed most.

OR:

- _____% of my residuary estate to be used where it is needed most.

OR:

- all of my residuary estate to be used where it is needed most.

OR:

- the sum of \$_____ restricted for the purpose of _____

OR:

- _____% of my residuary estate restricted for the purpose of _____

OR:

- All of my residuary estate restricted for the purpose of _____

If, in the future, the Benedictine Health Foundation, Inc. determines that the restriction placed herein would result in an impracticable use of the bequest, it may designate another purpose of its use that most nearly accomplishes my wishes.

This is just an illustration, of course. This language is not meant to take the place of qualified legal counsel.