



Benedictine Health Foundation's focus on programs for patients diagnosed with cancer, while continuing the legacy of the Benedictine Sisters' Spirit of Compassionate Care, is invigorating for those of us that love the Sisters and 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

The **Legacy Society** acknowledges donors who have named the Benedictine Health Foundation as the beneficiary of a planned gift in their estate to ensure we will continue our mission *"to raise and distribute financial resources to those struggling with a cancer diagnosis and whose financial means limit their ability to access or receive the care that they need."*



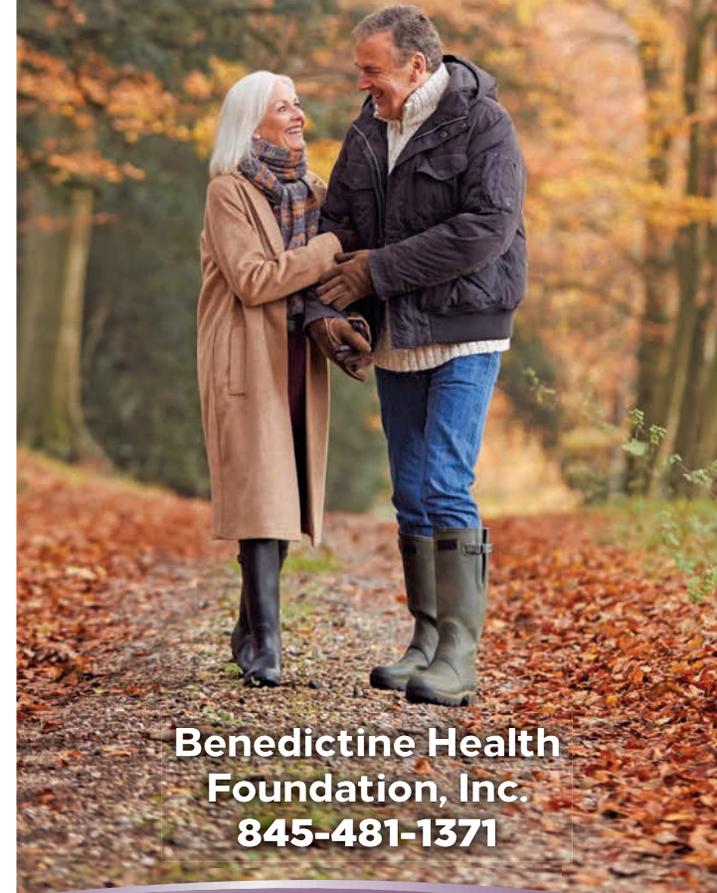
For more information about any of these charitable estate planning ideas or to explore other giving options, please contact:

**Bernadette Rexford, Executive Director
Benedictine Health Foundation, Inc.
144 Pine Street, Suite 220
Kingston, NY 12401
(845) 481-1371**

**via email at breford@bhfoundation.org
or visit us online:
BenedictineHealthFoundation.org**

Legacy Society

***A Legacy Of
Compassionate Care***



**Benedictine Health
Foundation, Inc.
845-481-1371**

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**

This information is not intended as financial or legal advice. Please consult your financial planner estate or tax attorney, or CPA as well as your heirs as you consider philanthropic gifts.

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

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 impractical use of the bequest, it may designate another purpose of its use that most nearly accomplishes your wishes.