

Planned Giving Program

We desire to provide a future gift to Baptist Health Care through a provision in my/our estate plans, and by completing this form notify Baptist Health Care Foundation of these plans. I/We understand that this future commitment can be revoked or modified by me/us at any time.

Print Names: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

It is my/our intent to leave a legacy gift to the Foundation through my/our:

- Will Life Insurance Policy
 Retirement Plan Assets or IRA
 Charitable Remainder Trust
 Other

Please use this gift in the following manner:

- I desire to have my gift invested where needed most for Baptist Health Care.
 I have indicated in my will or other estate documents the area I wish to support.

**If you do not check this or otherwise designate in your will or other estate documents, your gift will be directed by the Foundation Board in whatever ways it deems most appropriate.*

Please enroll me/us in the Legacy Society (check only one below):

- Feel free to publish my/our name(s) as members of the Legacy Society as a motivation for others to leave a future gift to the Foundation. (*The amount of your gift is not published*).

Please acknowledge me/us as follows:

- Please do not list my/our name(s) in publications or on the Donor Wall.

Donor Signature

Sharing Your Gratitude

Thank you for taking the time to make plans for the Baptist Health Care Foundation in your estate plans. Your gift will provide essential resources for Baptist Health Care to ensure a healthier tomorrow.



P.O. Box 17500
Pensacola, FL 32522
850.908.7906

baptisthealthcarefoundation.org

Planned Giving Program

Investing in Our Future



A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. CH606



Making your planned gift to Baptist Health Care Foundation today is a rewarding and meaningful way to contribute to the area's only locally owned not-for-profit health care system. You can create a legacy by making a planned gift to the Foundation to support a program of significance to you.

A planned gift provides the opportunity to secure income for you and your family, benefit from current tax incentives and help the Foundation to continue supporting patient care, programs and leading-edge technology within Baptist Health Care well into the future.

You don't have to have a large estate to make a meaningful planned gift. Gifts of any size that are bequeathed to the Foundation are planned gifts.



Planned gifts bring life-changing opportunities to Baptist Health Care. We ask that you please remember us when making your estate plans.

Please return the attached form to the Baptist Health Care Foundation, P.O. Box 17500, Pensacola, FL 32522, or call us at **850.908.7906**.

For more information about what type of legacy gift would meet both your needs and the needs of Baptist Health Care, contact your personal financial advisor, or the Foundation at **850.908.7906**.

Types of Planned Gifts

There are numerous ways to make a planned gift to the Foundation:

Will (Bequest) - The belief that only wealthy people can make a bequest is false. Individuals of modest means who feel they cannot make a gift during their lifetime can do so in their wills. Such donors benefit directly by reducing estate taxes, supporting a program of choice and honoring a loved one without depleting current income. A gift through a will is the most common type of planned gift.

Gifts of Life Insurance - It is common to have a life insurance policy that may no longer be needed for its original purpose. Naming Baptist Health Care Foundation as the owner and beneficiary of the policy provides you with an immediate tax deduction, and the value of the policy will be removed from your estate for probate purposes.

Gifts of Retirement Plans - One of the most beneficial ways for dealing with Individual Retirement Arrangements (IRAs) or other retirement plans is to create a charitable trust in your will to be funded with your IRA. In addition to tax savings, it may also greatly increase the amount received by your beneficiaries.

Gifts That Pay You Income - Some of the best ways to support the Foundation are available through life-income gifts that enable you to make a significant gift to the Foundation while increasing your cash flow. Examples of these types of gifts include Charitable Gift Annuities and Charitable Remainder Trusts.

For more information on these and other forms of planned giving, contact us at **850.908.7906**.