

A Gift of Legacy

Your story matters. By making a planned gift to the Baptist Health Care Foundation, you create a legacy of compassion and healing, supporting the programs that mean the most to you.

Our team is here to help your generosity make the greatest impact, so you can focus on what truly matters: changing lives.

100% of your gift stays local, advancing patient care, vital programs and innovative technology at Baptist, the area's only not-for-profit health care system that is based and led from within Northwest Florida.

Planned giving offers lasting rewards: financial benefits for you and your family, and the joy of knowing your legacy will elevate care for generations to come



Sharing Your Gratitude

Thank you for considering Baptist Health Care Foundation in your giving plans. No matter which giving option you choose, our team will guide you through the process and ensure your gift is honored in a meaningful way.



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448.227.8150

baptisthealthcarefoundation.org
EIN: 59-0192265

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

Ways of Giving

Investing in Our Future



Direct Gifts

Cash/Check/Electronic Fund Transfer/Credit Cards: These are all acceptable gifts and qualify for a charitable tax deduction.

Securities: There are distinct tax advantages to considering gifts of appreciated securities such as stocks, bonds and mutual funds. The donor incurs no capital gains tax on appreciated securities given for charitable purposes, and the full value qualifies for a charitable tax deduction.

Qualified Charitable Distribution (QCD from an IRA): Donors aged 70 1/2 and older can make a direct transfer of up to \$100,000 from an individual IRA to Baptist Health Care. The gift is credited against the required minimum distribution; it is not taxable or deductible.

Donor Advised Fund: Baptist can be the recipient of donor advised funds based on an annual request by the donor.

Real Estate: A gift of real estate or undivided partial interest that has appreciated in value can be an attractive option when considering a major charitable contribution.

Corporate Gifts: A corporation can make and deduct charitable gifts depending on the incorporation status.

Matching Gifts: Numerous companies have matching gift programs through which an employer can match a donor's charitable gift.

Life Insurance: The use of life insurance policies for charitable giving is another option when planning a major contribution.

Planned Gifts

Bequests or Last Will Designations: A donor may make a specific or contingent gift through a will or living trust.

Retirement Plan Beneficiary Designation: A beneficiary or contingent beneficiary designation of an IRA or 401(k) can be made.

Charitable Gift Annuity: A donor may establish a charitable gift annuity, which guarantees an annual payment for life based on the current age(s) of the beneficiaries.

Charitable Remainder Trusts: You may name Baptist as the beneficiary or co-beneficiary of a charitable remainder trust. Baptist will serve as the co-trustee of the trust.

Remainder Interest in a Residence or Farm in Retained Life Estate: Baptist may be named as the remainder interest in a residence or farm. The donor remains in the residence for their lifetime.

Endowment Gifts: Gifts designated for Baptist endowment may be made to support the long-term success of the organization.

Endowed Gifts: An endowed fund for gifts of \$100,000 and above can be established and will be recognized as a permanently established endowed fund. Funds can be pledged over five years or made through a testamentary gift.

Baptist Health Care Foundation does not provide legal, tax or financial advice, and this information is not intended as such. We encourage you to consult your own legal and financial advisors before any charitable gifts are made.

For more information, visit our website.
baptisthealthcarefoundation.com

