Heartfelt gratitude

One day, when Bob Schuberg was 55 years old, he felt little chest pains as he walked up a hill. A friend of his expressed concern that it was a sign that a heart attack was imminent and urged him to seek medical attention. After a visit to a cardiologist at Legacy Good Samaritan Medical Center, Bob underwent single bypass open-heart surgery. A year and half later, he ran his first marathon. “When I retired, I said I need to do something and I need to pay back the hospital for what they did for me,” Bob says.

So, for 28 years Bob, 89, has volunteered at Legacy Good Samaritan, where he escorts patients to various places throughout the hospital. “I’m their wheelchair pusher,” he says. His exemplary service has earned him the Treasure of Good Sam Award. Bob says, “I’ve been here a long time and I always say it’s the people that I work with that I find very uplifting, very pleasant, always friendly — that’s why I continue doing it.”

Bob, a former middle school principal, and his wife, Marilyn, a breast cancer survivor and former English teacher, decided they wanted to share their modest wealth with their children and with the things that influenced their lives. So, the

Continued inside...

“My heart was just very natural — Legacy Good Samaritan has always been our hospital — our three children were born here and both my wife and I had surgery here. It’s a good reason to pay back.”  

— Robert “Bob” Schuberg

Consider a gift to Legacy Health in your estate plan

Did you know there are many ways to give to Legacy Health besides writing a check? With a little planning, you can include a gift to us within your overall estate or financial plan that supports our mission and provides you with tax benefits in return.

These types of gifts are known as “planned gifts” and they often provide you with two main benefits:

1. Your gift is generally deferred until after your lifetime, so your current income isn’t affected.
2. With many planned gifts, you have the right to change your mind at any time throughout your lifetime, if necessary.

Visit www.legacyhealth.org/giving and click on “Gift Planning” to uncover which planned gift is right for you.

Feel free to contact Wendy K. Hill at 503-413-8123 or wkhill@lhs.org if you have any questions about the different ways you can plan a gift to support Legacy Health.
Heartfelt gratitude

Continued from front

Schubergs made a bequest to Legacy Good Samaritan through a living trust: “I feel very pleased that we made that decision,” Bob says. “It was just very natural — Legacy Good Samaritan has always been our hospital — our three children were born here and both my wife and I had surgery here. It’s a good reason to pay back.”

“One day I’ll have a former student come here as a visitor or as a patient. They’ll look at me and say, ‘Mr. Schuberg you look just the way you did — you wore a bow tie in school, too.’”

Bob chuckles, “The funny part is they recognize me, but I can’t recognize them because they were middle school kids when I knew them and now they’re 40, 50 or more years old.”

Legacy Builders

We have established the Legacy Builders Society, a special group of donors who have included a Legacy Health Foundation in their estate plans. This includes naming Legacy Health as a beneficiary of your will, trust, life insurance policy, retirement plan or by establishing a life-income gift.

Join now as a charter member and we will send you a lapel pin and an invitation to our annual recognition luncheon where you will hear about Legacy Health’s future. If you have already included Legacy Health in your estate plans, or would like to learn more about Legacy Health’s future, please contact Wendy K. Hill, associate director of gift planning, at 503-413-8123 or wkhill@lhs.org.

Living trusts offer flexibility

A living trust can offer many benefits when it comes to passing on your assets after your lifetime. Your trust can pay income, and even principal, to you for life and then to a beneficiary of your choice. After reviewing these benefits, if you decide a trust would be beneficial for your situation, we hope you’ll consider naming Legacy Health as a beneficiary of a portion of your trust. The benefits:

• Maintain control. With a typical living trust, you may change beneficiaries, add or withdraw assets, or amend or revoke the trust at any time.

• Ensure privacy. Unlike a will, a living trust is not subject to public scrutiny.

• Enjoy a smooth transition. Living trusts avoid many of the delays typically associated with the probate process, which can take one year or more depending on the circumstances.

• Save money. Although there are additional costs to establish a trust, the cost of probate can reach as high as 8 percent in some states.

• Benefit from professional management. Professional managers can help you make the most of your trust's assets and ultimately deliver more money to your beneficiaries.

Please contact Wendy K. Hill at 503-413-8123 or wkhill@lhs.org if you have questions about making us a beneficiary of a percentage of your living trust.

Charter Members

Legacy Builders as of 3/13/15

Anonymous (7)
Brian and Aphrodite Battalia
Romeo Alan Bautista III
Dorothea T. Beckwith
Dawn A. Bergman
Robert “Bill” Birge
Maureen and John Bradley
Phyllis *Gwen* Burns
Thomas Cauthers
Jefferson W. Chen, M.D., Ph.D.
George Cioffi, M.D. and Linda Cioffi
Ida P. Colver and Roger C. Ray
Jean Cory
Scott Dolph
Bill and Patty Gazmey
Howard and Gem Grogan
Dr. and Mrs. Mark T. Hattenhauer
Dr. Jonathan Hill and Penny Hill
Susan Jane Hoyez
Lewis A.* and Floetta M. Ide
Ida P. Colver and Roger C. Ray
Jean Cory
Scott Dolph
Bill and Patty Gazmey
Howard and Gem Grogan
Dr. and Mrs. Mark T. Hattenhauer
Dr. Jonathan Hill and Penny Hill
Susan Jane Hoyez
Lewis A.* and Floetta M. Ide
Terry and Jan Kester
Marlene E. Lawrance
Sandra Lewis, M.D. and James Rosenbaum, M.D.
Andrew G. Lockert
William B. Long III, M.D.
Elizabeth MacDonell
Mark Melman, M.D.
Mark T. Metzdorf, M.D.
Martin C. Mueller, M.D.*
Melinda Muller and Kit Barber
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J. Edward Oken, M.D.
Alfred Omo, M.D.
Martha Peterson
Cofer and Cloris Pappert
Patrick R. Prendergast
Fred and Orleen* Preston
Joyce Rawlinson
Barbara Perron Reader
M. Burke and Barbara K. Rice
Robert “Bob” and Marilyn Schuberg
Tom Shults
Barney Speight
Mark A. Terry, M.D.
Harold Weaver
K. Rena Whitaker
Walter Lewis Wright

*Denotes deceased

In order to help us improve our customer service, we would like to occasionally contact you by phone, email or mail to invite you to special events or promote Legacy Health’s programs. Please check the box to be contacted:

☐ Yes
☐ No

We respect your privacy! Information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.

Extend Your Impact.

I would like to receive a copy of the FREE guide Extend Your Impact.

I am ready to make a gift to Legacy Health foundation in my will or trust and would like official language to share with my attorney.

I would like more information on how to support Legacy Health after my lifetime.

I have included a gift to one or more of your medical center foundations in my will or other estate plans.

Please contact me about joining Legacy Builders.

Thank you for supporting a healthy future for our community!

Simple steps to help

You can make a big difference with just a little effort by including a gift to benefit Legacy Health in your will or living trust. Learn more about this easy way to make a difference by requesting our FREE guide Extend Your Impact. Just return the attached survey.

If you wish to be removed from our fundraising mailing list, please contact Wendy K. Hill by email at wkhill@lhs.org or at 503-413-8123.

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Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

We hope you enjoyed reading this publication. If you have any questions or comments, or if you would like additional information, please contact us at 503-413-8123 or at wkhill@lhs.org.