As the largest local, nonprofit health care system in Oregon and Southwest Washington, Legacy Health supports our community.

The Office of Philanthropy
P.O. Box 4484
Portland, OR 97208

family or charity? the answer is both

Naming a Legacy Health foundation as a beneficiary in your will is a simple way to enable the future of quality health care in your community. But maybe you’ve hesitated because you’re unsure about how much to give.

Because life is unpredictable and the value of your assets is likely to rise and fall, you don’t want to risk that someday your charitable gift could outweigh the well-being of your family. Fortunately, there’s a solution.

percentage giving
Instead of a fixed amount, consider gifting a percentage of your estate or of specific assets. That way, gifts to loved ones and to organizations such as a Legacy Health foundation remain proportional — no matter how your estate fluctuates.

Here are three simple ways to put family first while supporting those we serve:
1. Gift a percentage of your estate to a Legacy Health foundation in your will.
2. Leave us a percentage of your residual estate (the portion of your estate that remains after all gifts have been made and all claims of the estate are satisfied).
3. Name us as a beneficiary of a percentage of your life insurance policy or retirement account.

Giving a small percentage of your estate can have a bigger impact at Legacy Health than you might think. Contact Kathy Lynch Hostetler at 503-276-9496 or khostetler@lhs.org if you have questions about naming us as a beneficiary.
Gary and Linda Pope

From a very young age, Gary Pope has been a saver. “I don’t have a lot of needs,” he says. “If the TV works, the car starts and I have food, everything else is a plus.”

Soon after turning 40, he started investing in an individual retirement account (IRA), which grew into a comfortable nest egg. Last year, when he was 70½, it occurred to him that he could fulfill his required minimum distribution with an IRA charitable rollover. (See next page to learn more about this option.) “It’s a nice way for me to take care of some causes that I care about,” he says.

At 52, Gary learned he had polycystic kidney disease, an inherited disorder that causes numerous cysts to develop on the kidneys, reducing kidney function. Within four years, his kidneys began to fail. “The question was whether I could get a donor or if I was possible level.”

His wife, Linda, wanted to donate her kidney, but she wasn’t a match. His sister, however, was a perfect match. “It’s a huge commitment to be a donor,” Linda says. “His sister is the most wonderful woman I’ve ever met — she’s a hero.”

In 2003, Gary became the 269th recipient of a kidney transplant at Legacy Good Samaritan Medical Center. “It’s a wonderful gift,” Gary exclaims. “It’s about the greatest gift you can give to somebody.”

Because he is so grateful for the exceptional care he and his sister received from his nephrologist, William M. Bennett, M.D., and the Legacy Transplant Services team, Gary made a direct transfer from his IRA (tax-free) to the William M. Bennett Chair of Medicine nephrologist, William M. Bennett, M.D., and the Legacy Transplant Services team, Gary

“ar your IRA

An IRA is an appealing way to save for retirement: Make a contribution and enjoy tax savings. But eventually, that tax bill comes due — when you take your annual distributions and again when you leave your assets to heirs. If you want to avoid the tax bite and make an impact on compassionate health care in your community, then consider a gift to a Legacy Health foundation from your IRA.

make your gift today

If you’re 70½ or older, you can use the IRA charitable rollover to make a tax-free gift to a Legacy Health foundation. This law allows you to transfer any amount up to $100,000 annually directly to a qualified charitable organization without paying income tax on the distribution. Additional benefits include:

• You’ll see the difference you’re making today.
• You pay no income taxes on the gift. The transfer doesn’t generate taxable income or a tax deduction, so you benefit even if you don’t itemize your tax deductions.
• Your gift can satisfy all or part of your required minimum distribution.

magnify your impact after your lifetime

Regardless of your age, you can give from your IRA by naming us as a beneficiary of your account. This is a great option for extending support from your IRA beyond your lifetime.

It’s simple! Just fill out a form and let us know about your plans so we can thank you.

did you know?

Through Legacy Health, you can also support two unique collaborations:

CARES Northwest: A community-based medical program for the assessment, treatment and prevention of child abuse, the program is a collaborative effort among four regional health care systems.

The Unity Center for Behavioral Health: A first-of-its-kind facility in the Pacific Northwest, pairing emergency treatment with a path to recovery for every patient, Unity is a collaboration among four regional health care systems and numerous community partners.

The entire transplant team is grateful to Mr. and Mrs. Pope for their generous donation. We plan to use their contribution to continue our core mission of patient-centered care at the highest possible level.”

— William M. Bennett, M.D.
Medical Director, Legacy Transplant Services

Whether you make your impact at Legacy Health today or after your lifetime, your gift matters. Please contact Kathy Lynch Hostetler at 503-276-9496 to discuss your plans.

yes, I’d like to see my generosity in action at Legacy Health!

Please complete and return this reply card today. Thank you!

I would like to receive a copy of the FREE guide make the most of your retirement plan assets.

I would like to include a gift to a Legacy Health foundation in my will or other estate plan.

I have included one or more of your foundations in my estate plan but haven’t yet notified you. My gift is in honor of:

Name
Relationship

Name — Please print

Telephone

Email

Address

City, State ZIP

We respect your privacy. Information collected here will not be shared outside of our organization.

If you wish to be removed from our fundraising mailing list, please contact giving@lhs.org or call 503-415-4700.

maximize your tax advantages

Learn why your IRA makes an excellent charitable gift — and not such a great inheritance for your heirs — by requesting your FREE copy of make the most of your retirement plan assets using the attached reply card.

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