

# To Build and Sustain

## Leave a Legacy and Help Generations to Come



Prairie Ridge  
HEALTH  
FOUNDATION

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At Prairie Ridge Health, building lasting relationships is at the heart of what we do. The people we meet and the communities we serve inspire us to provide high quality personalized healthcare every day.

Prairie Ridge Health Foundation, working in partnership with us, ensures that our mission to improve the health of our community is sustained through thoughtful programs that support our hospital and clinics. Our efforts are successful in helping to maintain providing the quality care we need to improve the well-being of those we care for. And by giving to a community foundation, the Foundation makes certain meaningful investments that support health and wellness.

When you give to Prairie Ridge Health Foundation, you are giving more, essentially building for your health, family and neighbors. You get to see the impact of your generosity that makes a difference in the lives of people who need it most.

Financial support from individuals like you makes it possible for the Foundation to purchase and equipment, fund facility improvements, provide community education and fundraising, and fund educational programs, services and initiatives for our community. We are honored to serve you, and appreciate your generosity.

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PrairieRidgeHealth/Foundation

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### What Are Planned Gifts?

Planned Gifts enable individuals to make larger gifts to Prairie Ridge Health Foundation than they could make through ordinary means.

These planned gifts provide a long-term benefit to the donor. Other gift types are restricted to the value of the gift. Planned Gifts allow donors to make larger gifts than they could otherwise make.

There are several types of planned gifts:

- Gifts That Return Income or Charitable Deductions:** These gifts allow donors to receive an annual stream of income or a charitable deduction for the full value of the gift.
- Gifts That Protect Assets:** These gifts allow donors to protect their assets while still supporting the Foundation. Examples include Retained Life Estate Charitable Lead Trusts.

### DON'T KEEP YOUR GIFT A SECRET

It's really already announced! Prairie Ridge Health Foundation through your news program or website can notify donors about their gift.



### Retained Life Estate

AN OPTION THAT LETS YOU HAVE IT BOTH WAYS

**HOW IT WORKS:**

- Transfer future interest in real estate to the trust.
- Continue living there and pay all expenses.
- We own the property in the trust.

## 1. OUTRIGHT GIFTS

### Outright Gift of Cash or Check

A QUICK AND EASY WAY TO GIVE

**HOW IT WORKS:**

- Donor
- Donor completes a contribution form and sends it to Prairie Ridge Health Foundation.
- Donor receives a receipt for their contribution.

**HOW IT WORKS: GIFTS OF CASH OR CHECK**

A gift that is made in the most common and easiest method for making a charitable contribution.

**IF YOU RECEIVE TAX DEDUCTIONS ON YOUR TAX RETURN:**

- Donor receives a receipt for their contribution.
- Donor receives a receipt for their contribution.

**THE SEVERAL BENEFITS:**

- Donor receives a receipt for their contribution.
- Donor receives a receipt for their contribution.

### Gift Through Your Will or Trust

WHERE THERE'S A WILL, THERE'S A WAY

**HOW IT WORKS:**

- Donor
- Donor completes a contribution form and sends it to Prairie Ridge Health Foundation.
- Donor receives a receipt for their contribution.

**HOW IT WORKS: GIFTS THROUGH YOUR WILL OR TRUST**

Donors can make a significant impact on the health of their community through their will or trust.

**HOW IT WORKS:**

- Donor
- Donor completes a contribution form and sends it to Prairie Ridge Health Foundation.
- Donor receives a receipt for their contribution.

**HOW IT WORKS: APPRECIATED SECURITIES**

Donors can make a significant impact on the health of their community through their appreciated securities.

## Discover

How Everyone Benefits from Planned Gifts

Your Goal	Your Gift	Your Method	Your Benefit
Make a gift that costs you nothing during your lifetime	Gifts Through Your Will or Trust ("Bequest")	Include a gift of cash, property, or a share of your estate through your will or trust	A gift that does not affect your cash flow, and you can adjust your gift as circumstances change
Make a gift and receive a steady income for life	Charitable Gift Annuity, Charitable Remainder Unitrust, Charitable Remainder Annuity Trust	Share your assets with us in a plan that gives you an income for life and passes us the remainder	Receive tax-advantaged payments for life, along with a charitable tax deduction
Make a gift while leaving more of your estate to your heirs	Gifts of Retirement Assets	Name us as the beneficiary of your retirement plan, and pass the assets to your heirs	Avoid up to 60% income tax on your retirement assets, pass more of your estate to your heirs
Make a gift while avoiding capital gains liability	Gifts of Appreciated Securities	Give us appreciated stocks, bonds, or mutual funds; we'll sell and use the proceeds	Make a significant gift; receive an immediate income tax deduction; pay no capital gains tax
Make a large gift at little cost	Gift of Life Insurance	Donate a life insurance policy you no longer need or name us in an existing one	Take a tax deduction now; take possible future deductions through gifts to pay policy premiums
Make a gift that preserves your assets for your heirs	Charitable Lead Trust	Use appreciated assets to create a trust that will pay us income for a period of years, and then pass the assets back to you or your heirs	Shelter your growing assets and benefit our organization through gift and estate tax advantages

Don't let a bank teller control your legacy. With a simple signature, you can designate the balance of your bank account, brokerage account, retirement plan, annuity or life insurance policy to pass to our organization after lifetime. It's the easiest way imaginable to support Prairie Ridge Health Foundation. Just inquire at your financial institution or ask your plan administrator for a beneficiary designation form. In short, the forms you need are issued a 1000 (Transfer-On-Death) or a 1001 (Transfer-On-Death).

800-490-7090  
success@plannedgiving.com

1288 Valley Forge Road  
Suite 82  
Valley Forge, PA 19460

PlannedGiving.com

### Charitable Lead Trust

RESERVE AN INDEPENDENCE

**HOW IT WORKS:**

- Donor
- Donor transfers property to the trust.
- Trust pays income to the donor.
- Trust pays income to the charity.
- Donor receives a receipt for their contribution.

**HOW IT WORKS: CHARITABLE LEAD TRUST**

A gift that allows you to receive wealth with significant tax advantages. You greatly reduce or avoid paying gift and estate tax in some planning situations. Simply, these trust income gains to charity for a few years.

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