

# JOIN US

## PLANNED GIVING LUNCH & LEARN

Join us for a **FREE event** to learn how giving can leave a lasting legacy in your community!

*Learn about giving options including:*

- IRA Charitable Rollovers (QCD)*
- Donor Advised Funds*
- Gifts of Property*
- Bequests & more*

**THURSDAY, JUNE 5**

**12:00 - 1:00 PM**

**SEAFARERS MEMORIAL BUILDING**

601 SEAFARERS WAY, ANACORTES

**FREE LUNCH**

PROVIDED BY ISLAND HEALTH FOUNDATION



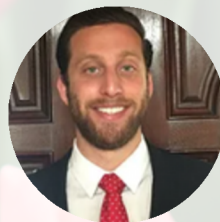
**Elliott Johnson, CFP**  
Haven Financial



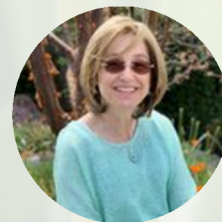
**Troy Kunz, CFP, AAMS**  
Edward Jones



**Desha Furin, CPA**  
Furin & Company



**John Manni, Esq.**  
Cohen, Manni, Theune  
& Manni LLP



**Neli Espe, Esq.**  
Olympic Legal



**ISLAND HEALTH  
FOUNDATION**

Please RSVP by emailing  
[foundation@islandhospital.org](mailto:foundation@islandhospital.org)  
or by calling 360.299.4201



# ANNUAL AND LEGACY GIVING

*Ways to make an impact and support the well-being of our community*

For the past 47 years, **Island Health Foundation** has been a critical partner in funding important services, programs and new technology and equipment at Island Health (formerly Island Hospital).

A nonprofit 501(c)(3) organization, the Foundation extends opportunities to financially invest in the delivery of award-winning, top-notch healthcare in our community.

Below are a few ways we invite people to support our mission.

## **Ways to Give:**

- a. **Annual Giving:** Every gift to Island Health Foundation, no matter how large or small, makes a difference and helps us build a healthier community. Annual giving is the backbone of our organization – whether you are supporting our Area of Greatest Need or designating your donation to a specific area of focus.
- b. **Honoring Caregivers and Gifts in Memoriam:** The Foundation is proud to help you honor a physician, nurse or member of your care team. We also gratefully accept gifts in memory of loved ones. Any gift can be made in memory or in honor of a special person or event.
- c. **Planned and Legacy Giving:** The Island Health Foundation welcomes gifts through your long-term estate or financial plans. By making gifts in this way, you help ensure high quality health care continues in our community for generations to come (see the back of this page for more information).
- d. **Employee Giving** – Employees of Island Health have the opportunity to give with each paycheck.
- e. **Corporation and Foundation Giving:** As a non-profit organization, the Foundation welcomes relationships with businesses and foundations who share our commitment to community health.
- f. **Matching Gifts:** Many employers have matching gift programs through which your generosity to Island Health can be multiplied. As a nonprofit organization, the Island Health Foundation is eligible for many matching gift programs of corporations, foundations and other organizations.

### **To make a gift by mail, please send to:**

Island Health Foundation  
1211 24<sup>th</sup> St  
Anacortes, WA. 98221

**To use your credit card to make a gift through our secure online giving website:** [myihf.org](http://myihf.org)

**Island Health Foundation's tax identification number is EIN# 91-1030686.**

*The Island Health Foundation is a nonprofit 501(c)(3) charitable organization, and contributions are tax-deductible to the extent allowed by law. To confirm Island Health Foundation has received your gift and for tax purposes, you will receive recognition as appropriate and a letter documenting the gift amount.*



## PLANNED GIVING AND OTHER WAYS TO GIVE

**Planned or Legacy Giving:** When you include Island Health Foundation in your estate plan, you become a member of our Legacy Circle. Most importantly, your generosity will ensure top-notch healthcare for our community for years to come. Legacy Giving requires some degree of planning and is a long-term commitment that can have a lasting impact. Planned gifts can take many forms including:

1. **Property:** Gifts of Real Estate and other types of property allow you to leverage your assets to achieve maximum impact on the health & wellness of your community.
2. **Bequest:** You can create a legacy by including Island Health Foundation in your will or trust. A gift in any amount makes a difference in helping support this important work. IHF can provide sample language for your will.
3. **Beneficiary Designation:** You can name Island Health Foundation as a beneficiary on accounts including your life insurance policy or investment accounts, or as a Transfer on Death (TOD) beneficiary on investment and banking accounts.

**Other Ways to Give:** In addition to gifts of cash, there are a number of ways to support the Foundation:

1. **IRA Charitable Rollover:** Also known as a Qualified Charitable Distribution (QCD). For those 70 ½ or older, you can give from your IRA without paying federal income tax and satisfy your Required Minimum Deduction.
2. **Donor Advised Fund:** As one of the easiest and most tax-advantageous ways to give, Donor Advised Funds (DAFs) are the fastest-growing charitable giving vehicle in the United States.
3. **Gifts of Appreciated Securities:** Giving the gift of Appreciated Securities or mutual funds can be a tax-savvy way to benefit from growing assets. When you donate appreciated securities or mutual funds in support of our mission, you can reduce or even eliminate federal capital gains taxes on the transfer. You may also be entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer.

**Stock Transfer Instructions:** The simplest way to make a gift of stock is to call your broker and ask him/her to transfer your stock electronically to Island Health Foundation's account at Charles Schwab:

**Charles Schwab & Co. Inc.**

Attn: IST West 8

El Paso, TX 79998-2600

**IHF's Account Number:** 6665-3177

**IHF's DTC Number:** 0164, Code 40

**Account Type:** Schwab One Charity Nonprofit

IHF Federal Identification number/EIN: **91-1030686**

Please call Island Health Foundation office and provide your name, your phone number, the name of the stock(s) you are giving and the number of shares (e.g., 20 shares of Microsoft) so we can record your gift properly and send you a receipt promptly **(360) 299-4201** or email: [foundation@islandhospital.org](mailto:foundation@islandhospital.org)

*The information above is not intended as legal or tax advice. For such advice, please consult an attorney, financial or tax advisor.*

## Sample Language for Your Will or Trust:

### Unrestricted Bequests

Unrestricted bequests are the most valuable to any charity, as they allow the organization to apply your gift to the area of greatest need. Examples of types of unrestricted bequests include:

#### Specific Bequest

*"I give to CHARITY, (EIN #HERE), or its successor organization, (the sum of \$ \_\_\_\_\_ )(or \_\_\_\_\_ % of my estate), (or other property herein described) to be used for its general support and charitable purposes without restriction."*

#### Residuary Bequest

*"I give to CHARITY, (EIN #HERE), or its successor organization, (all or \_\_\_\_\_ % of) the residue of the property owned by me at death, real and personal and wherever situated, to be used for its general support and charitable purposes without restriction."*

#### "Greater of" Residuary Bequest

*"I give to CHARITY (EIN #HERE), or its successor organization, the greater of \_\_\_\_\_ % of my estate or \$ \_\_\_\_\_ to be used for its general support and charitable purposes without restriction."*

### Contingent Bequests

It is possible that the primary beneficiary or beneficiaries of your estate may predecease you. In that case, a contingent bequest naming CHARITY as an alternate beneficiary can provide a meaningful alternative.

*"I give [all or \_\_\_\_\_ %] of the residue of the property owned by me at my death, real and personal and wherever situated, to \_\_\_\_\_, if he/she survives me. If he/she does not survive me, I give to CHARITY (EIN #HERE), or its successor organization, [all or \_\_\_\_\_ %] of the residue of the property owned by me at death, real and personal and wherever situated, to be used for its general support and charitable purposes without restriction."*

### Restricted Bequests (restricted for a specific use\*)

Some donors would like their gift to support a specific project, program or area of research. Restricted bequests are welcome, although it is important they provide for some flexibility to adapt to changing needs and programs.

*"I give to CHARITY (EIN #HERE), or its successor organization, the sum of \$ \_\_\_\_\_ (or \_\_\_\_\_ % of my estate) (or other property herein described) to be used for (designated purpose\*). If at any time it becomes impossible or impractical for my gift to be used for the above designated purpose, CHARITY shall use my gift for a purpose and in a manner that it determines most closely meets the above designated purpose."*

\*If you are interested in supporting a specific project, program or area of research, it is best to discuss your plans with your charity of choice's planned giving professionals before completing your will to confirm the charity can carry out your wishes.

*The above are not intended as legal, accounting or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisers should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document.*



# Planned Giving Resources



**Elliott Johnson, CFP**  
Haven Financial

Elliott.H.Johnson@RaymondJames.com  
<https://www.raymondjames.com/havenfinancialpartners>



**Troy Kunz, CFP, AAMS**  
Edward Jones

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