

Sample Language for Planned Gifts

Planning your legacy not only involves deciding how to allocate your assets, but also how to pass on what is truly important to you – *your* values, *your* ideals, *your* special story. Charitable gift planning is simple, flexible and transformational, offering opportunities to enhance your financial and estate plans while impacting future generations. Here are a few ideas:

BEQUESTS

Simply include the following sentence in your will or trust: “I, _____, of _____, give, devise and bequeath to Saint Francis Healthcare System Foundation, 211 Saint Francis Drive, Cape Girardeau, Missouri, 63703, [the sum of _____] or [_____% of the rest, residue, and remainder of my estate, both real and personal] designated for the _____ Fund.”

CONTINGENCY GIFT

If (name of beneficiary _____) does not survive me, or shall die during the administration of my estate, or as a result of a common disaster, then I give to Saint Francis Healthcare System, 211 Saint Francis Drive, Cape Girardeau, Missouri 63703, all of the rest, residue, and remainder of my estate, to be used for its benefit. *Note: Takes effect only if a primary intention cannot be met.*

LIFE INSURANCE

Life insurance offers flexibility in gift planning. For example, you can simply designate as primary, contingent or partial beneficiary: “Saint Francis Healthcare System Foundation, 211 Saint Francis Drive, Cape Girardeau, Missouri, 63703, IRS ID#43-111276, designated for the _____ Fund.” Or you may benefit from current tax advantages by either transferring ownership of an existing policy or taking out a new policy with Saint Francis Healthcare System Foundation as owner and beneficiary.

RETIREMENT ASSETS

Designate as primary, contingent or partial beneficiary: “Saint Francis Healthcare System Foundation, 211 Saint Francis Drive, Cape Girardeau, Missouri, 63703, IRS ID#43-111276, designated for the _____ Fund.” *Note: The IRA Charitable Rollover allows individuals age 70-1/2 or older to transfer up to \$100,000 per year in charitable gifts, pay no tax on the distribution(s) and meet minimum distribution requirements.*

QUESTIONS

To discuss your options, please contact Saint Francis Healthcare System Foundation. We also recommend that your professional advisors be included in the conversation. We look forward to working with you, your family and your advisors to help you plan for tomorrow and receive maximum benefits today.

Please consider remembering Saint Francis Healthcare System Foundation in your will.

Saint Francis Healthcare System Foundation

211 Saint Francis Drive, Cape Girardeau, MO 63703

Office: 573-331-5133 Fax: 573-331-5075 Email: foundation@sfmc.net