

## DOCUMENTING YOUR GIFT

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Each year, many community members reveal that they have included Hoag in their estate plans. Some provide additional details about their intentions, in effect “documenting” their generous future gifts to Hoag. Here are five good reasons why bequest donors should consider this step.

### 1. RECOGNITION

Documenting your bequest will allow Hoag to recognize you now for your future gift. While there is no minimum gift amount necessary to become a member of the Hoag Heritage Society, depending on the estimated value of your bequest, you may also qualify for Hoag’s Benefactor Program.

### 2. PEACE OF MIND

Providing Hoag with copies of your bequest will help ensure your wishes are met. With respect to designating specific purposes or programs, Hoag can review the language to make sure it can carry out your intentions and, in the case of an endowed fund, that the necessary endowment language is included.

### 3. DESIGNATING A PURPOSE

If you have not yet designated a purpose, you can sign a Charitable Bequest Intention form specifying a purpose. A signed Charitable Bequest Intention form and copies of your bequest documentation will complete our records and be kept safely in our files.

### 4. INSPIRING OTHERS

Estate gifts are a crucial source of support for Hoag. If you document your bequest, the estimated value can also count toward current fundraising totals, inspiring others to follow in your footsteps.

### 5. NO OBLIGATIONS

Please understand that by documenting your bequest, you are in no way making your bequest binding or irrevocable. You still have the liberty to revise your estate plan if your circumstances or priorities change, although we do ask that you notify us as a courtesy if that happens.

To document your bequest, we humbly request the following items:

- A copy of the portion of your will or trust document referencing Hoag Memorial Hospital Presbyterian
- An executed copy of the document’s signature page
- A page indicating the date of the document
- If your gift to Hoag is expressed in your document as a fraction or percentage, we respectfully ask you to provide us an estimate of the dollar value in writing or by completing a Charitable Bequest Intention form.
- Your name and birthdate
- If the bequest is included as part of a couple’s estate plan and will not be realized until the death of the survivor, please provide copies of your spouse’s or partner’s documents and his or her birthdate.

Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. It solidifies a lifelong relationship with Hoag that will ultimately be made permanent by the legacy you leave. For sample bequest language, to send documentation or for more information about gift planning, please contact Julie Heggeness, JD, CSPG, TEP, Executive Director, Gift Planning & Legal, Hoag Hospital Foundation, at (949) 764-7206 or Julie.Heggeness@hoag.org.