



**Hoag
Hospital
Foundation**

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HOW TO MAKE A BEQUEST

A bequest is one of the easiest gifts you can make to significantly impact our work. Your estate planning attorney can include a provision in your will that leaves a lasting gift to Hoag Hospital Foundation. Your bequest could be a gift of specific assets (such as a vehicle, artwork or coin collection), a dollar amount (\$100, \$1,000 or \$10,000), or a percentage of your estate (3%, 10% or even 25%). A bequest could also be made from the residue of your estate or what is left after all gifts have been made to your heirs.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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PLANNED GIVING BRIEF

THE BENEFITS OF A CHARITABLE BEQUEST

A BEQUEST IS A WONDERFUL WAY FOR YOU TO HELP FURTHER THE WORK OF HOAG HOSPITAL AND ITS MISSION.

While it's impossible to know or control what happens in the future, you can have security about achieving your ultimate goals by making a plan.

Planning is one way to create a secure future for you and your loved ones. With a good plan, you can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

BEQUEST BENEFITS

A charitable bequest is an easy way for you to help us in our work. Here are some of the many benefits of bequest giving:

- **It costs you nothing today**
- **A bequest is free of federal and estate tax**
- **Your bequest can be changed later**
- **You can still benefit your heirs with specific gifts**
- **You can leave a legacy through a bequest**

BENEFITS OF AN IRA BEQUEST

One type of bequest to consider is a bequest from your IRA. If you leave your IRA to your children, your heirs could face a significant tax. Talk with your estate planner about the types of assets to leave to your family that can produce little or no tax. Then consider making a bequest of your IRA to Hoag Hospital Foundation. We will receive the full proceeds free of tax and can use this gift to help further our mission. Please contact your plan custodian to designate us as a beneficiary of your IRA.