



Legacy Societies

Samuel & Isabel Small Legacy Society
Anna Huber Legacy Society

An invitation to make an impact on the future of health care in our community



A Better Way for Future Generations

Is it too ambitious to dream that no one will be without adequate health care in York County – ten, twenty and fifty years from now? That the residents of this county will enjoy access to the best holistic and integrated care this country can provide?

Imagine a community where every member benefits from proactive wellness resources and top-notch medical intervention when inevitable illness, disease and trauma strike. Where every individual can experience meaningful community events and support. Where the best of health care allows every teenager and child to develop their potential as tomorrow's leaders.

A growing number of people in our community are partnering with WellSpan York Health Foundation to help us move our community toward this level of wellness.

Two Legacy Societies honor WellSpan York Health Foundation supporters who demonstrate a special commitment to the

future of our mission. By planning a gift to WellSpan York Health Foundation, they help to ensure a continuing legacy of superior health care for generations to come.

Would you also join the Samuel and Isabel Small Legacy Society or the Anna Huber Legacy Society by including WellSpan York Health Foundation in your legacy plans?

By partnering with WellSpan York Health Foundation, you can leave a legacy that will impact the health of our community's children, grandchildren and future generations.

This booklet was developed to celebrate the impact of WellSpan York Health Foundation and to invite you to become part of our purpose and promise to make a difference in our community. Please take a few minutes to think about your legacy and consider some giving opportunities that best fit with your ideals.

There are a number of ways you can join others in leaving a legacy. Some are very simple. Others are more complex. But the bottom line is that there is a way to meet your needs and wishes for family and charitable causes.

We will be happy to learn more about your legacy goals and discuss whether WellSpan York Health Foundation can help you achieve them. Along with your financial and legal advisors, we can help to identify options for your consideration.

We welcome the opportunity to be part of this journey with you.

Sincerely,

Jim Shenk, MA, CAP, CFRE
Director of Planned Giving
WellSpan York Health
Foundation

What are Your Dreams?

WellSpan York Health Foundation has many dreams for improving health care in our community. But when thinking about your legacy, it is more important to start with your dreams, your values and what is important to you.

Do you dream of a time when no person needs to go without health care?

When all children establish healthy habits?

When communities have easy access to the latest medical treatment and technology close to home?

These are dreams we share. We are committed to wellness for everyone in our community.

Note: *Please discuss your gift intention with our office to ensure that we understand your wishes and can carry them out. We can help you with the appropriate language.*

Are these issues important to you?

Then let's talk. Our commitment is to work with you to discover if there is a mutually beneficial way to create your legacy, one that has meaning for you:

- An unrestricted gift that gives WellSpan York Health Foundation the freedom to use your eventual gift for the most important needs when received.
- A restricted gift that allows you to direct your gift to a specific purpose.
- Endowed funds that generate income annually in perpetuity for our mission for restricted or unrestricted purposes.



Your Invitation to Become Part of a Legacy Society

Our Legacy Societies celebrate donors who support the future of WellSpan York Health Foundation with a gift from their estate or a life income gift. We invite you to use this booklet to learn about opportunities that might fit your legacy goals and financial plans. You'll also see stories about why other donors decided to join the vital group of Legacy Society members. Our Legacy Society members provide hope, healing and wholeness for generations to come.

Members of the Legacy Societies receive:

- The satisfaction of promoting hope, healing and wholeness today and for future generations
- A special listing in WellSpan York Health Foundation's recognition of donors
- Invitations to special events
- Recognition as members of a special group of WellSpan York Health Foundation supporters

The Samuel and Isabel Small Legacy Society

The Samuel and Isabel Small Legacy Society recognizes individuals who have provided for the future of WellSpan Health in York County through a financial or estate plan.

Samuel was a distinguished leader in York County. He was a

director of York's first building association and of the York and Cumberland Railroad. But he is better known for his heart. He cared deeply for the health and welfare of his community. He founded the York Benevolent Association in 1863, the York Children's Home for orphans of soldiers two years later and the York Collegiate Institute. In 1879, he led a group of philanthropists in founding York Hospital.

Isabel was the daughter of a prominent attorney. A woman of rare intellect, she too is remembered for her heart for others.

She organized the women of York to aid wounded soldiers during the Civil War by providing bandages and sewing clothing. She donated and bequeathed substantial resources to benevolent organizations.

WellSpan York Hospital stands as a memorial to the care of Samuel and Isabel for those in need of health care. Their generosity touched many children and adults throughout the county during their lifetime; a legacy that continues to impact our community in profoundly important ways 140 years later.

Supporting WellSpan York Hospital, or one of its related institutions, through WellSpan York Health Foundation with an estate or other planned gift, will ensure this continued legacy of improving the health and wellbeing of residents of York County for our children, grandchildren and future generations.



The Anna Huber Legacy Society

The Anna Huber Legacy Society recognizes individuals who have provided for the future of WellSpan VNA Home Care through their financial or estate plan.

This society is named in honor of the founder of VNA Home Care (previously Visiting Nurses Association), Anna M. L. Huber. Born in 1874, Ms. Huber began a long and dedicated campaign to improve York's community health care for all residents. In 1904, she helped organize the St. Anne's Guild to sew for the poor in the maternity ward of York Hospital. In 1907, the group decided to start a district nursing program. One year later,

the first visiting nurse began practicing in York. Anna Huber became the VNA's first President and served in that role for 48 years. She was an excellent organizer and an avid fundraiser.

Supporting WellSpan VNA through WellSpan York Health Foundation with an estate or other planned gift will ensure that Ms. Huber's vision of serving all of those in need will continue for future generations.

Your stated intention to make a Planned Gift for WellSpan York Health Foundation qualifies you for membership in one of our Legacy Societies. Your recognition is not based on a specific amount.

Be efficient with your taxes.

Planned Giving tools offer a number of ways to be tax-efficient with your assets and financial planning. Gifts may allow for immediate tax deductions, a reduction of capital gains taxes when applicable, and ways for beneficiaries like heirs and non-profits to make the most of the gifts received. By planning your charitable giving, you can make your dollars go further than by simply writing a check. It's called good stewardship! Talk with a trusted advisor. We can help.

100% of your gift will go toward the program or service you designate.

Some of the Easiest Ways to Make an Impact

Bequests

A bequest is the most common way of leaving a legacy. A bequest is a gift of cash, securities or other property designated via an estate plan.

- Make a bequest to WellSpan York Health Foundation in your will or trust (a specific dollar amount or asset, a percentage of your estate, or a gift of the balance of your estate);
- Leave all or part of your retirement assets to WellSpan York Health Foundation; or
- Name WellSpan York Health Foundation as owner or beneficiary of a life insurance policy.

Change of Beneficiary Form

Filling out a “Change of Beneficiary Form” for a retirement account or life insurance policy is a simple process, not requiring changes to your will or trust. More importantly, retirement plans (IRA, 401k, 403b, pension or other deferred plans) are

often the largest assets in your estate – and the most heavily taxed. If you leave these funds to someone other than a spouse, a large portion of these assets might be lost. Simply complete a change of beneficiary form to leave all or a portion of the plan to WellSpan York Health Foundation. WellSpan York Health Foundation gets the full value of these funds.

Life Insurance

A gift of life insurance to WellSpan York Health Foundation is a great way to establish a legacy. There are several options:

Donate a paid-up policy that you do not need as an immediate gift;

Change the beneficiary designation of a current policy for a future gift to WellSpan York Health Foundation; or

Purchase a new policy and name WellSpan York Health Foundation as owner and beneficiary.

Gifts from your IRA

You do not need to delay a gift from your IRA. The now-permanent Charitable IRA Rollover allows you to satisfy your required minimum distribution, substantially reduce taxable income and support WellSpan York Health Foundation. If you are over age 70½, you can donate up to \$100,000 from your IRA to WellSpan York Health Foundation, avoiding any federal income tax on these funds. Our office can assist you with language for requesting your fund administrator to effect this donation.

Transfer of Other Assets

Common bank accounts (i.e., checking, savings and money market accounts) can be transferred to a beneficiary by completing a “**payable on death**” (POD) form. This allows assets to transfer outside the probate process.

A similar method using a “**transfer on death**” (TOD) form is typically used for stocks, bonds, brokerage accounts, mutual funds and real estate.

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We Believe in Giving Back



Tony and Stef Campisi generously support many causes in York County with health care high on their list of priorities. As a former member of the WellSpan York Hospital board of directors, Tony saw intimately why strong community support is critical to having excellent health care. He also helped to establish the WellSpan York Health Foundation

along with many other leadership roles he has held in the community. He credits his long-time mentor, Arthur J. Glatfelter, for instilling a deep commitment to philanthropy, both personally and as Chairman of the Glatfelter Insurance Group. Stef has been passionate about promoting the health of thousands of children through her many years of leadership in the Tennis For Kids program. Together, Tony and Stef are passing along their philanthropic values to their children and grandchildren. By including WellSpan York Health Foundation in their estate plans and involving family, they are demonstrating their commitment to help ensure superior health care for the residents of York County for generations to come.

You Might want to Consider Gifting these Assets:



Real Estate

A gift of your appreciated property – such as your home, vacation property, vacant land, farmland or commercial property – may be an ideal way for you to leave a lasting legacy.



Private Business Interests

Donating appreciated stock or bonds is a common and easy way to benefit our mission. It is also possible to donate all or a portion of privately held business interests. This takes more discussion with and assistance from relevant financial and legal professionals. But yes, it is possible, and can make a wonderful gift!



Farm Commodities

Make a gift of what you grow and harvest, from farm crops like grain to animal products like dairy, honey and more. You can deduct the cost of production from your taxes and you may qualify for other tax benefits as well. What a creative opportunity.



Valuable Collections, Mineral Rights

Where there's a will, there's a way! Let's discuss!

How it Works



① Gift of cash or securities

② Income tax deduction & fixed income



③ Remainder to a WellSpan hospital, facility, program or foundation



Giving Back that Gives to You

Charitable Gift Annuities

A Charitable Gift Annuity offers you steady payments for life with funds eventually going to WellSpan York Health Foundation. This can add an extra measure of financial security in your retirement.

You can use a range of assets (cash, stocks, bonds, commodities, retirement assets and more). You may be able to deduct a significant part of your gift immediately and part of the annuity payments you receive may be tax-free.

A deferred annuity can increase the annuity payments. Charitable Annuity Trusts offer additional flexibility depending on your needs.

For a personalized illustration that demonstrates how a Charitable Gift Annuity might benefit you, contact our office.

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I Give so Others Might Also Live



Chloe Eichelberger’s near-death experience motivated her to include WellSpan York Hospital in her estate plans. “John Lennon famously paraphrased American journalist and writer Allen Saunders in his 1980 recording of Beautiful Boy: ‘Life is what happens while you’re busy making plans.’ On a wintry morning in February 1984 that prophetic line came to life for me.

“Following an accident which left me trapped in my car for four hours, under a burning trailer which had overturned on my car, I was ultimately freed by the grace of God working through some amazing first responders and

firefighters. Then I was rushed to WellSpan York Hospital to begin what would be a 57-day battle for my life.

“Ultimately, they did save my life and I became aware of so many things I had not considered before. One of which is how fragile and fleeting life can be and how a great hospital can tip the scales in favor of saving lives. Finally, now and always, we must work together to ensure that state-of-the-art equipment will always be the norm at WellSpan York Hospital. To that end I have included WellSpan York Hospital in my estate plans.”

Ready to Impact the Health of our Community?



Refresh

your will or other estate plan to document your philanthropic wishes.



Review

beneficiary designations of your retirement plans and life insurance.



Recycle

assets by donating appreciated stock and buying the same stock with a new cost basis to avoid capital gains taxes and expand your giving potential.

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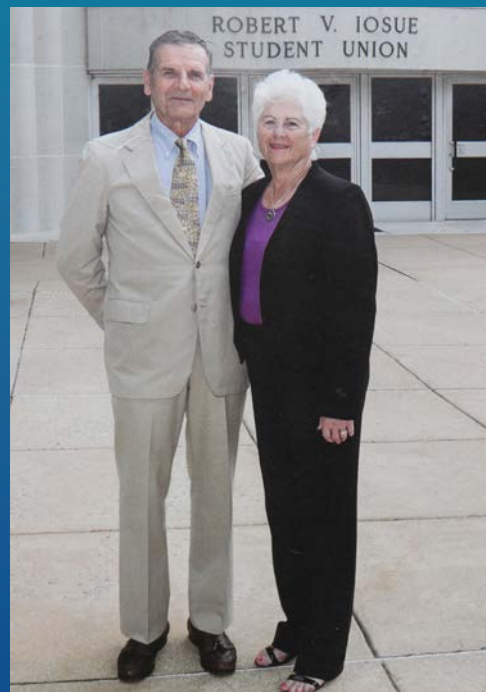
We Give to Support Excellence in Health Care

In the late 1990s, Dr. Robert Iosue came face to face with his mortality when he had blockage in all five major arteries of his heart. Thanks to expert care from physicians, who have become good friends, he not only survived but he and his wife, Christina, have had full and meaningful lives. Dr. Iosue is well-known for putting York College on the map and for his leadership on the boards of WellSpan York Hospital and WellSpan York Health Foundation. Mrs. Iosue has chaired the board of the Lancaster Theological Seminary and supported various causes in York.

The Iosues have impacted many lives. And their legacy will continue. With gratitude for the life-saving care received from providers at

WellSpan York Hospital, Dr. and Mrs. Iosue have not only been strong supporters of WellSpan York Health Foundation but have also established multiple charitable gift annuities with the Foundation. These annuities provide them with life-long payments. They also have the satisfaction that every dollar of the remainder of these gift annuities will support their intended purpose through WellSpan York Health Foundation.

Dr. and Mrs. Iosue are joined by many others in the Samuel and Isabel Small Legacy Society, a special group of supporters, whose inclusion of the Foundation in their estate plans will continue their legacy of supporting excellent health care for the generations that follow.



Information for Your Professional Advisors

Thank you for helping your client make a gift to WellSpan York Health Foundation.

Our office is available to assist you and your client in achieving your client's philanthropic goals. We are happy to meet in person, provide sample language for making a bequest to WellSpan York Health Foundation and create a variety of gift illustrations.

WellSpan York Health Foundation is dedicated to improving the health of the local community by supporting the York-based entities of WellSpan Health. The Foundation is a community-based, tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code of 1986, for which a donor is or will be entitled to charitable contribution deductions per IRS guidelines. Donors to the Foundation are encouraged to consult their own professional advisors regarding the deductibility of their gifts.

Legal Name: WellSpan York Health Foundation

Federal Tax ID: 23-3050192

Address: WellSpan York Health Foundation
2500 S. George St., York, PA 17403

Bequest Language

I give WellSpan York Health Foundation, a non-profit organization supporting the York-based entities of WellSpan Health, located in York, PA the sum of \$_____ (or asset) to be used for its general support (or for the following purpose: _____).

Please contact the WellSpan York Health Foundation Office regarding language for contingent, residual or other gift language including language for any restricted gifts or for questions about charitable giving strategies.

WellSpan York Health Foundation

(717) 851-3595

www.yorkhealthlegacy.org





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