Making a Gift Through Your Plans

Making a gift through your plans can be a simple yet effective way to ensure that your legacy continues well into the future. We are grateful for those who have chosen to make special arrangements to ensure that we are able to continue to provide top notch health care to the communities we serve.

Making such a gift costs you nothing now and enables you to contribute to our mission well into the future. Gifts can be arranged in a several ways including your will, living trust or beneficiary designations on your financial accounts.

**Gift through your will or trust**
The most common way of making a gift through your plans is to create a bequest. A bequest is simply a gift from your estate – a transfer of cash, securities or other property – made through your will or living trust. While you arrange the gift now, the gift is completed at a later date. Until then, you maintain control of your assets. This allows you to make a gift that costs you nothing now, and you maintain use of the assets until an appointed time in the future.

Your gift can be stated as a specific dollar amount or a percentage of your assets. You can also make your gift contingent on other events taking place. Ultimately, your gift can be designated toward your favorite hospital or program to have the impact most meaningful to you.

We would be glad to provide you sample bequest language that you can share with your attorney. This resource could be helpful in providing the wording that best fits your situation.

**Gift through your beneficiary designations**
Using beneficiary designations, you can also give assets, such as retirement plans, brokerage accounts, and bank accounts, by designating us as a beneficiary of them, in whole or in part. Like gifts from a will or living trust, beneficiary designations are set-up to transfer assets in the future. However, a beneficiary designation only applies to the assets in the account covered. For retirement plans and IRAs, you could enjoy the additional benefit of avoiding taxes on assets that have been tax-deferred. If this type of asset is donated to us, no tax is due. Also, if you have a donor-advised fund, you might consider making us an ultimate beneficiary of the account.

**The Amicus Society**
Have you included us in your plans? Please let us know—and ask us about *The Amicus Society*. It is Advocate’s special honor society for those who make gift commitments now to support our future.

**For more information contact:**

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*Note: This information is intended to be for educational purposes and should not be considered legal, tax or accounting advice. You should consult with your professional advisors for applicability to your own situation.*
Making a Gift by Will or Living Trust

Thank you for considering making a gift through your will or living trust to support our healing and health care mission. We would be honored to be a part of your legacy. Bequests may be of cash, securities, real estate, or other property, and all sizes are welcome. If you desire to specify a particular use, we are glad to assist with memorializing your intent.

Please direct your bequest to Advocate Charitable Foundation or Aurora Health Care Foundation. Advocate Charitable Foundation accepts gifts on behalf of all Advocate hospitals and programs. Aurora Health Care Foundation accepts gifts on behalf of all Aurora hospitals and programs. The following language may be useful to your attorney:

Specific Bequest: I give (specify either Advocate Charitable Foundation or Aurora Health Care Foundation) in Downers Grove, Illinois, the sum of $__________ to be used by __________ (specify name of hospital or program) in (City, State), [for its special needs or for its __________] (specify fund or program).

Residual Bequest: I give (specify either Advocate Charitable Foundation or Aurora Health Care Foundation) in Downers Grove, Illinois, ___% of the residue of my estate to be used by __________ (specify name of hospital or program) in (City, State), [for its special needs or for its __________] (specify fund or program).

Contingent Bequest: In the event that ________________________ does not survive me, I give (specify either Advocate Charitable Foundation or Aurora Health Care Foundation) in Downers Grove, Illinois, the sum of $__________ (or, alternatively, ___% of the residue of my estate) to be used by __________ (specify name of hospital or program) in (City, State), [for its special needs or for its __________] (specify fund or program).

Additional suggested language

To ensure that we will be able to make use of all bequests intended to support our mission and to address possible situations of future obsolescence, we encourage inclusion of the following:

If, in the opinion of the Board of Directors of (specify either Advocate Charitable Foundation or Aurora Health Care Foundation), or any successor thereto, the need for funds for the purpose described above no longer exists at some future date, it is authorized to use these funds for a purpose as similar as practical to my stated interest.

For more information:

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