

FIND A PLAN THAT'S RIGHT FOR YOU.



First of all, thank you for considering a gift to help support our mission. We know you support our work because you believe in what we do, and because you want to help make a difference in the lives of others. But we'd also like to make sure you benefit from making a gift to us.

How does this happen? You may be surprised to learn that many gift types offer significant financial and tax benefits.

You Have Options

You are probably familiar with outright gifts, such as cash or a check, which you make today and Self Regional Healthcare can use right away. But sometimes an immediate gift isn't the best option, especially if you feel unsure about giving up assets today that you and your loved ones might need in the future.

A planned gift is a perfect solution to this problem. There are many different types of planned gifts and each offers unique advantages. Some planned gifts are revocable—a bequest in your will or living trust, for example—so you can change your mind at any time.

Or, they can be irrevocable—just as outright gifts are—so that you benefit from an immediate income tax deduction.

Irrevocable planned gifts are attractive because they are deferred. You part with an asset today, but the actual giving of the asset to us is put off for a while—often until after your lifetime (and that of a surviving beneficiary, if you wish). Until that time, you enjoy the benefits from the gift.

For example, with a charitable remainder trust, you receive lifetime income from the asset after it's placed in a trust, and then we receive the remainder of the trust after your lifetime. Or, you could deed us a remainder interest in your home and still retain the right to live in it for life.

The key feature of planned gifts like these is that they provide important benefits to you as well as the Self Regional Healthcare Foundation.

Learn More

We've designed the chart inside to summarize the benefits of several common charitable gifts. Just think of what you want to accomplish with your gift, and there's probably a way to do it!

We're here to answer any questions you might have about planned giving. We can examine your particular situation and, together with your attorney and/or financial advisors, help you find ways to support our mission while ensuring your family's financial security. Call us for more information.

JOIN WITH OTHER SUPPORTERS TO INCREASE YOUR IMPACT

Over the years, supporters like you have selflessly given their time, talent and assets to support quality healthcare in our communities. Each contribution has allowed us to sustain a growing level of support that secures our long-term financial stability.

If you feel strongly about our charitable work and would like to join with other supporters who share your values, we hope you'll consider joining our Legacy Circle program.

If you have already made a gift to support Self Regional Healthcare, please let us know so that we can properly thank you and welcome you into our Legacy Circle.

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SELF REGIONAL
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Give Lead Grow

PLAN AHEAD

Estate planning provides an opportunity to create a legacy that you and your loved ones can feel good about. Our FREE guide ***Your Personal Planning Road Map*** breaks the planning journey into simple steps. Simply return the enclosed reply card to request your copy today.



Your Gift	Your Goal	How You Make the Gift	Your Benefits
Simple Gifts Anyone Can Make Your Will or Living Trust A Beneficiary Designation	<ul style="list-style-type: none"> Defer a gift until after your passing. Maintain control of your assets during your lifetime. 	<ul style="list-style-type: none"> Work with your attorney to add a gift in your will or living trust detailing your donation to the Self Regional Healthcare Foundation. Designate the Self Regional Healthcare Foundation as beneficiary of a percentage of your retirement plan, savings or brokerage account or life insurance policy. 	<ul style="list-style-type: none"> Maintain your current lifestyle while making a meaningful gift to support Self Regional Healthcare. Enjoy flexibility to change your plans as life changes. Pass your retirement plan assets to Self Regional tax-free.
Gifts of Assets Stock or Other Securities Real Estate Personal Property	<ul style="list-style-type: none"> Make a gift now and receive benefits. Make a larger gift with little or no effect on cash flow. 	<ul style="list-style-type: none"> Give stock or securities that have increased in value directly to the Self Regional Healthcare Foundation. Donate your residence, farm or commercial property. Donate tangible personal property such as art, collectibles or other items of value. 	<ul style="list-style-type: none"> Qualify for a potential income tax deduction. Avoid capital gains taxes on assets that have increased in value. Transfer the expense of insuring or maintaining assets you no longer need.
A Gift That Pays You Charitable Gift Annuity*	<ul style="list-style-type: none"> Supplement your retirement income with steady payments. Receive payments that are partially income tax-free. 	<ul style="list-style-type: none"> Make a donation of cash or securities to benefit Self Regional Healthcare through a simple exchange for fixed payments for life. 	<ul style="list-style-type: none"> Qualify for a potential income tax deduction. Enjoy tax savings on a portion of each payment you receive throughout your life expectancy. Receive fixed payments for life. What is left of your gift after your passing supports Self Regional Healthcare.
A Flexible Gift That Pays Income Charitable Remainder Unitrust Charitable Remainder Annuity Trust	<ul style="list-style-type: none"> Supplement your own retirement income or that of someone else. 	<ul style="list-style-type: none"> You transfer cash, securities or other appreciated property into a charitable remainder trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to you, or another beneficiary if you choose, for a lifetime or a term up to 20 years. When the term is up, the balance goes to the Self Regional Healthcare Foundation. 	<ul style="list-style-type: none"> You can make a generous gift to Self Regional Healthcare, receive an immediate income tax deduction for the charitable portion of your gift and eliminate capital gains tax at the time of the gift when the trust is funded with appreciated assets.
Gifts That Reduce Gift and Estate Taxes on Assets You Pass to Family Charitable Lead Unitrust Charitable Lead Annuity Trust	<ul style="list-style-type: none"> Provide a revenue stream to the Self Regional Healthcare Foundation. 	<ul style="list-style-type: none"> You transfer securities or other appreciating property into a charitable lead trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to the Self Regional Healthcare Foundation for a lifetime or term of years. The balance then passes to your heirs. 	<ul style="list-style-type: none"> Support Self Regional Healthcare during your lifetime, reduce your taxable estate and often reduce gift taxes.

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*Charitable gift annuities are not available in all states or through all organizations. Please contact us if you are interested in a gift annuity.

LET THE JOURNEY BEGIN

- Now that I/we have seen some of the many ways I/we can give to support Self Regional Healthcare, please send a copy of **Your Personal Planning Road Map**, a free guide focused on helping me/us make plans for the future.
- I/We would like to learn more about planned giving and its benefits. Please contact me/us using the information below to start a conversation.
- I/We have included the Self Regional Healthcare Foundation in my/our estate plan (and haven't previously notified you). My/Our gift is in honor of:

Name/Relationship

- I/We qualify for recognition in the Legacy Circle program due to a gift left in my/our estate.

Name(s) that should be recognized

Name—Please print.

Address

City, State

ZIP

Telephone

Email

**Thank you for
supporting better
health in our
communities!**

We respect your privacy. Information collected here will not be shared outside of our organization.

- If you do not wish to receive materials from the Self Regional Healthcare Foundation, please check the box and return this reply card, or contact us at 864-725-4256 so that we may remove your name from future mailings