

# The Self Regional Healthcare Foundation Planned Gifts Committee: Ideas for your charitable giving for the coming months, years, and even decades.

## 1. Donate appreciated stock to fund your gift.

Most individuals understand how easy it is to write a check when you want to make a gift to your favorite charity. However, if you can remember to pause before you pull out your pen, it really does pay off to consider whether gifts of appreciated stock, mutual funds and other appreciated assets would be a better way to make your charitable gifts. When you give shares of long-term appreciated stock and other assets, you can be eligible for a charitable income tax deduction at the fair market value of the shares. When you gift the stock, you are not hit with any capital gains tax. By contrast, if you were to sell those shares and give cash to your charity from the proceeds, you would be liable to report the gain on your income taxes and have much less cash to work with after the capital gains tax payment. The Self Regional Healthcare Foundation is happy to help you learn more about how easy it is to take advantage of this tax-savvy giving technique.

## 2. Plan ahead for your business exit.

If you own all or part of a private business, keep in mind that charitable giving can factor into your eventual exit strategy. You could be sitting on substantial unrealized capital gains if the business has grown substantially over time. Upon a sale, capital gains tax will be triggered, reducing the proceeds you get to keep. No capital gains tax will apply, however, to the sale of the portion of the business owned by a charity. Plus, you can be eligible for a charitable income tax deduction in the year of the transfer based on the appraised fair market value of the shares owned. It is important to remember that a strategy like this only works with careful advanced planning. The Foundation will be happy to work with you and your advisors to help achieve your personal, charitable, and financial goals.

## 3. Start paying attention now to the estate tax exemption sunset.

The estate tax exemption or the total amount a taxpayer can leave to family and other individuals during their life and at death before the hefty federal gift and estate tax kicks in, is scheduled to drop, rather precipitously after December 25, 2025. For 2024, the estate tax exemption is \$13.61 million per individual, or \$27.22 million per married couple, an increase over 2023 thanks to adjustments for inflation. Later this year, the IRS will issue inflation adjustments for 2025. For 2026, without legislation to prevent it, the exemption is scheduled to fall back to 2017 levels, adjusted for inflation, which would roughly total \$7 million per person. That is quite a drop! This means many more people, maybe including you, could be subject to estate tax in the not-too-distant future. We'll be happy to work with you and your advisors to explore how charitable giving techniques can help you avoid estate tax and become a member of the Foundation's Legacy Circle program which recognizes individuals that have remembered the Foundation in their estate plans.

## 4. If you can take advantage of the QCD, do it.

A Qualified Charitable Distribution ("QCD") from your IRA is a very smart way to support charitable causes. If you are over the age of 70½, you can direct up to \$105,000 from your IRA to certain qualified charities such as the Self Regional Healthcare Foundation. If you're subject to the rules for Required Minimum Distributions (RMDs), a QCD gift/transfer counts toward your RMD requirement. Through a QCD, you avoid income tax on the funds distributed to our Foundation. Our team can work with you and your advisors to go over the rules for QCDs and evaluate whether a QCD is a good fit for you. You can also make a one-time QCD up to \$53,000 to establish a life income agreement, such as a charitable remainder trust, that benefits you or your spouse with a lifetime income stream and the Foundation with funds in the future.

## 5. Review your IRA beneficiary designations.

As you review your assets and how they are titled, perhaps in connection with an annual financial and estate plan review, pay close attention to tax-deferred retirement plans such as 401(k), 403b and IRAs. Typically, you'll name your spouse as the primary beneficiary of these accounts to provide income following your death or to comply with legal requirements. However, as you and your advisors evaluate whom to name as a secondary beneficiary of these tax-deferred accounts, don't automatically default to naming your children or your revocable trust. You and your advisors may determine that naming a charity is by far the most tax-efficient upon your death and establish a philanthropic legacy. A bequest like this avoids not only estate tax, but also income tax on the retirement plan distributions. That's why non-retirement fund assets may be better suited to pass to children and grandchildren.

We would be honored to work with you and your advisors to structure a gift to the Self Regional Healthcare Foundation in your will and estate plans to support favorite programs or projects beyond your lifetime. Our goal is to help you make the most of your philanthropic intentions. For more information, call or email Ken Coffey, Executive Director, Self Regional Healthcare Foundation at 864-725-5142 or kenneth.coffey@selfregional.org.

Thank you for your past and ongoing support!

*Hannah Metts*

Hannah Metts  
Co-Chair, Planned Gifts Committee  
Board of Trustees Member



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# Equation For Progress Campaign Update

September 2024

Greetings supporters and friends!

We are pleased to provide you with our "summer" Self Regional Healthcare Foundation Report. As you may be aware, our Foundation places a high degree of emphasis on three goals:

1. Providing education and information on healthcare and your health system
2. Recognizing individuals, businesses, and foundations that support our mission with charitable support
3. Increasing philanthropic support to help Self Regional Healthcare grow and expand the breadth and scope of healthcare services in Greenwood and the Lakelands region

Our Foundation is meeting its mission on all three fronts. We have organized some top-notch health education programs with our Medically Speaking series featuring expert members of our Medical Staff. We invite you to partake in any or all these programs. We call your attention to the chart below that documents the incredible success our Special Gifts Committee has enjoyed in the recruitment of new members to our beloved Madame Curie Society. In 2016, we had 144 members. Today, we're at 340 and growing! If you are part of this incredibly generous and caring group of philanthropists, we thank you. If you're not, do not hesitate to contact us about how to join us. The planning for our Mid-Winter Ball is in full swing! Lastly, it's not too early to think about your year-end giving. To help you, we've included an article with some tax saving and financial tips.

The Equation For Progress Campaign helped bring daVinci Robotic surgery to Self Regional Healthcare. Already, over 1,000 patients have benefited from this state-of-the-art technology! Next up for the Campaign: creating a comprehensive breast center for Greenwood and the Lakelands. We invite you to be part of the solution to the Equation For Progress Campaign!

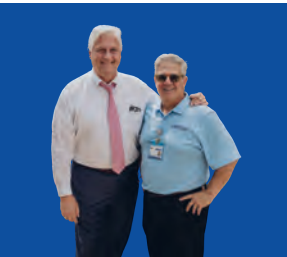
Thank you for your past and continued support.

*John Cooper*

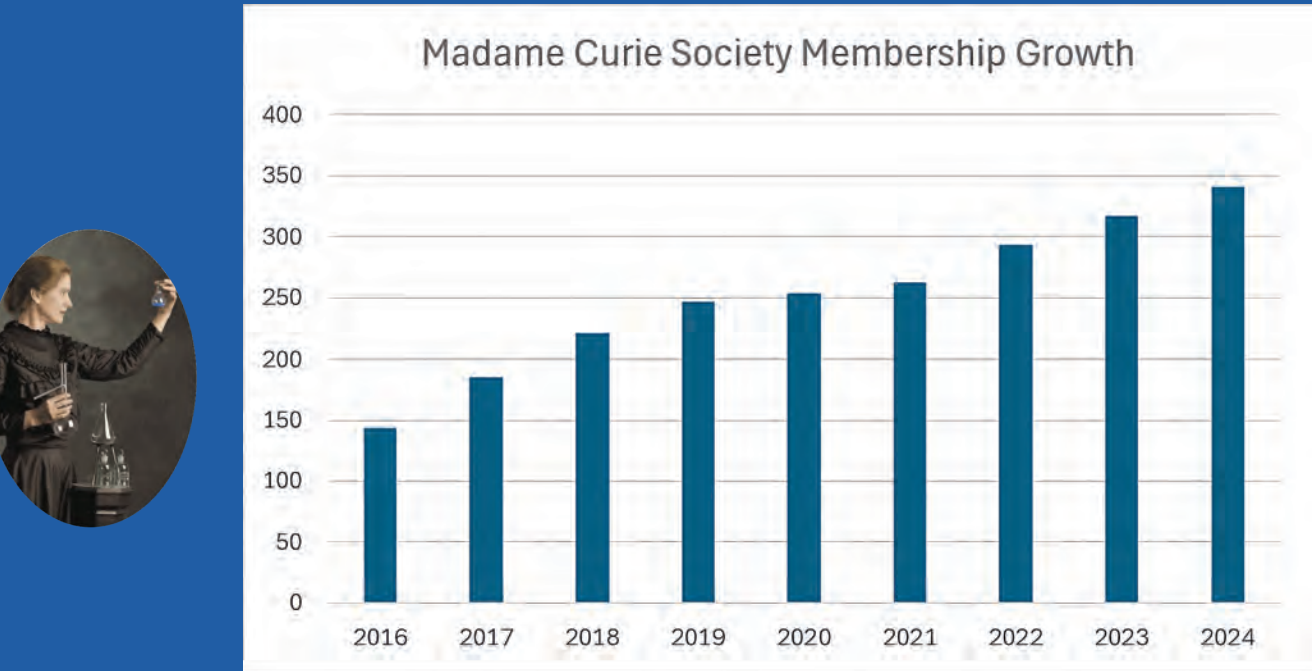
John Cooper  
Chairman  
SRH Foundation

*Ken Coffey*

Ken Coffey  
Executive Director  
SRH Foundation



# Here we grow...



About Self Regional Healthcare Foundation: Self Regional Healthcare Foundation is a 501(c)(3) nonprofit organization that funds health-related projects and programs at Self Regional Healthcare, a non-profit, regional referral hospital serving the residents of Greenwood, Abbeville, Laurens, Saluda, McCormick, Edgefield and Newberry counties. To be removed from future mailings, please call 864-725-4256 or email foundation@selfregional.org.



Thank You to the Dabo and Kathleen Swinney All In Team Foundation!



Our own Glenda Corley, Vice Chair of the Self Regional Healthcare Foundation Board of Trustees and Foundation supporter Denise Manley attended the 2024 Dabo Swinney All In Team Foundation Ladies Clinic at Clemson University last month. It was a special day that raised funds for breast cancer research, education, technology, and prevention. Our team had the good fortune to show Coach Swinney an artist’s rendering of our 3-D Mobile Mammography vehicle. The Swinney All In Team Foundation has committed to giving \$250,000 to help with the purchase of our new vehicle.

Our Spring Social was a pig pickin’ good time!

The Self Regional Healthcare Foundation Special Gifts Committee hosted its sixth annual Madame Curie Society Spring Social on May 22nd for members and guests. The event was held at the Gatewood Clubhouse. Self Regional Healthcare Foundation’s Food & Nutrition catered the pig-picking menu and musical entertainment was provided by Trey Ward and Friends.



Madame Curie Society

Please welcome our newest Madame Curie members since October 1, 2023.

Wells Ballentine  
Mr. & Mrs. John Bartoli  
Chris & Kristen Cabri  
Dr. & Mrs. Reid Castellone  
Chris & Sudie Clem  
Ken & Laura Doby  
Drs. Prince & Chinenye Ejindu  
Dean Harris-Faden  
Lawrence & Sandra Fischer  
Tara & Scott Gibson  
Tom & Betty Grantham  
Patrick & Andrea Hobson  
Raymond & Ritia Hopkins  
Dr. & Mrs. Alexander Johnson  
John King and Jacki Berkshire-King  
Mr. Monty & Dr. Tammy Kitchens  
Mr. & Mrs. Dave Kithil  
Ricardo & Dr. Katie Lizarribar  
Ryan Macrae  
Jim & Denise Manley  
Barb Miller  
Mark & Sharon Mulkey  
Jamie & Jessica Ballentine Ramm  
Ostell & Patti Scarborough  
Mr. & Mrs. Charles Schulze  
Mr. & Mrs. Joshua Scott  
Jacob Shearer



We thank the following members who have renewed their commitment since October 1, 2023

**Diamond**  
Drs. Shekar & Priya Kumar  
Dr. & Mrs. Anthony Timms  
Ken & Laine Orcutt  
  
**Emerald**  
Drs. Rafal & Joanna Sadurski  
John & Ferol Stroud  
  
**Ruby**  
Thornwell Dunlap III  
Kendra and Bill Keeney  
Linda McDonald  
Dr. & Mrs. Lee A. Patterson  
Dr. Ruiling Yuan & James Yuan, Phd.

**Sapphire**  
Will & Sherri Gordon  
Dr. & Mrs. John McAlhany Sr.

**Member**  
Drs. Jennifer & Kevin Elrod  
Jason & Amanda Smith  
Bill & Linda Stevens

The Self Regional Healthcare Foundation Annual Support Committee:  
SELF REGIONAL HEALTHCARE FOUNDATION ANNOUNCES CHAIRS AND DATE FOR THE 2025 MID-WINTER BALL



Dr. Lindsay Snider served as a co-chair for the 2024 Ball, is a dentist at Cambridge Dental and is a member of the Foundation’s Madame Curie Society. Mrs. Davis Renee Migdalas served on the Silent Auction Committee for the 2024 Ball, is a Nurse Practitioner at Self Regional Healthcare and is the owner of Sweet Tea’s Children’s Boutique in Uptown Greenwood.

“Davis Renee and I are thrilled to serve as the ball chairs for this fun yet impactful event. We have big shoes to fill as last year’s Mid-Winter Ball was one of the best! Not only was it a great time, the 2024 Ball netted \$135,000 in support of the Foundation’s efforts to purchase a new, 3D mobile mammography unit,” said Dr. Lindsay Snider.

“Our goal is to continue providing a great experience for all Ball attendees and to raise \$150,000 to continue assisting the Foundation with the purchase of this new motor coach which is part of the Equation For Progress Campaign,” said Davis Renee Migdalas.

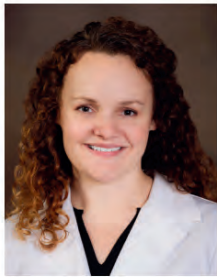
The Ball is set for the evening of Saturday, February 22, 2025, and will be held at the Medford Family Center at Piedmont Technical College.

The Self Regional Healthcare Foundation Business and Industry Committee:

Join Us for Medically Speaking

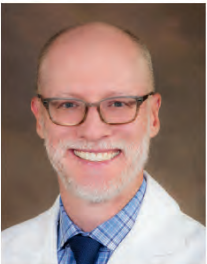
Time: 5:30pm Location: Lander University Josephine B Abney Cultural Center Auditorium

**September 26**  
Why Is It So Hard To Lose Weight and Keep It Off?



Katherine Johnson, M.D.

**October 17**  
Evolution of Spine Care in Greenwood



John Cole, IV, M.D.



Sumeer Lal, M.D.

**November 7**  
Early Onset Colorectal Cancer: What Is It and How To Prevent It



Bryan Green, M.D.

Self Regional Healthcare  
Advanced Air Transport

It was an exciting day as Self Regional Healthcare and Med-Trans Corporation held a ribbon-cutting ceremony on June 20th to celebrate our new helicopter transport service, SRH Advanced Air Transport. This new helicopter service will help care for Greenwood and the surrounding counties and significantly enhance our ability to provide rapid, critical care to patients in need. SRH Advanced Air Transport will enable Self Regional Healthcare to respond more swiftly and efficiently to medical emergencies, ensuring that our community receives the best possible care when it matters most.



“One Never Knows What the Day Will Bring...” Lynette Jordan

While walking her dog, Savanah Lakes resident, Lynette Jordan was bitten by a poisonous snake. Upon calling 911, the EMS was dispatched and in minutes were at her home. While riding in the ambulance on the way to Self Regional Hospital, the driver deemed it necessary to change route and have her flown by air ambulance through Med Trans One to the hospital. In minutes, she was in a large open field just off of Highway 378 where the McCormick Sheriff and other public safety personnel had the road safely blocked off and the helicopter was waiting for her. Ten minutes later, they landed on the new helipad at the hospital. Upon arrival, a large medical team was waiting and quickly took her into the Emergency Room where she was greeted by another team of professionals who again treated her with excellent care. Due to the quick moving inflammation and other complications, she was admitted to ICU for continued care and observation for a 2 day stay. “The level of care I received from all – and I mean all the staff – who worked those 2 days was exceptional!” said Mrs. Jordan. “We both are so proud to live in a town that is so well connected to life saving services and to have the remarkable level of professionals who take the time to care for the needs of others and do it with grace.”

Excerpt from the Journal Messenger and Reporter