



Planned Gifts to Support Columbia Memorial Health

Find a charitable plan that lets you provide for your family and support the lifesaving work of Columbia Memorial Health. Use the chart below to identify common types of planned gifts that might benefit you and your personal goals.

YOUR GIFT	YOUR GOALS	MAKING THE GIFT	YOUR BENEFITS
BEQUEST	Defer your gift.	Name Columbia Memorial Health (CMH) in your will stating a specific amount, percentage or residual.	<ul style="list-style-type: none"> • Save on estate taxes for your heirs • Retain assets during life. • Become a member of the Legacy Society
RETIREMENT ASSETS	Reduce your tax burden.	Name CMH the beneficiary of your retirement fund.	<ul style="list-style-type: none"> • Save on estate taxes. • Bypass probate. • Become a member of the Legacy Society.
LEAD TRUST	Reduce gift and estate taxes on assets going to loved ones or back to you.	Create a trust for a term of years. Give assets at term to loved ones or yourself.	<ul style="list-style-type: none"> • Reduce your taxable estate. • Transfer property to loved ones. • Become a member of the Legacy Society.
CHARITABLE REMAINDER TRUST	Receive a deduction and regular income.	Create a trust fund with cash or securities.	<ul style="list-style-type: none"> • Enjoy an immediate partial deduction. • Save on estate taxes. • Select fixed or variable income. • Become a member of the Legacy Society.
GIFT ANNUITY	Supplement income with a quarterly payment.	Enter a charitable gift annuity contract with CMH. Receive a fixed income for life.	<ul style="list-style-type: none"> • Reduce your taxable estate. • Rely on fixed life income for you and a loved one. • Take a partial tax deduction. • Expand benefits by choosing deferred payments. • Become a member of the Legacy Society.
LIFE INSURANCE	Make a significant gift at little cost.	Contribute a policy you no longer need by making CMH owner and irrevocable beneficiary.	<ul style="list-style-type: none"> • Earn a tax deduction for cash value. • Make premium payments and receive a tax deduction. • Become a member of the Legacy Society.
ENDOWED FUND	Make a gift that lasts forever.	Establish a permanent fund. Support your designation with perpetual income.	<ul style="list-style-type: none"> • Maximize your legacy. • Clarify your wishes. • Increase the longevity of your gift.

This information is not intended as financial or legal advice. Please consult your financial planner, estate or tax attorney, or CPA as well as your heirs as you consider philanthropic gifts. We are happy to discuss other gift options. If you would like more information, please contact us at (518) 828-8362.

