

Ways to give

THE CHOICE IS YOURS

Support HopeHealth, Hope Hospice,
Hope Dementia & Alzheimer's Services

Retirement Plan Assets

Making a gift from a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh, TIAA/CREF or pension plan is a wonderful contribution with significant tax savings for you. Retirement plan assets are often subject to extremely high combined estate and income taxes.

If you name HopeHealth as a beneficiary of a modest percent of your plan, you receive the plan benefits during your lifetime and are able to make a gift to HopeHealth upon death. It is possible to name multiple individuals and charities to share the assets.

Life Insurance

Naming HopeHealth as the beneficiary of a life insurance policy is an excellent planned gift. You can name us as a beneficiary of a present policy or create a new policy with HopeHealth as the owner. While there are no immediate tax savings, this type of gift is often eligible for a federal tax deduction at the time of death.

Board Restricted Funds

You or your family may create a board restricted fund that provides permanent support for HopeHealth. Establishing such a fund in the name of a loved one is an especially meaningful way to permanently honor his or her memory. These can be established with your estate planning attorney or through a source such as your local community foundation.

Bequests

Naming HopeHealth in your will or trust is easy and can be accomplished in a variety of ways. You can make a substantial gift without tapping into your assets during your lifetime.

- **Percentage bequest** – a certain percentage of your estate is given to HopeHealth
- **Fixed dollar of specific asset bequest** – a fixed amount of your money or a specific asset is given to HopeHealth
- **Residual bequest** – after bequests to your heirs and beneficiaries, all remaining assets are given to HopeHealth
- **Contingent bequest** – if all heirs and beneficiaries are deceased, your estate is given to HopeHealth

Your Planning

Much of our organization's strength is due to the forethought of individuals like you who have included a gift to us as part of their personal financial plan. Most gifts of this nature are mutually beneficial because they also provide financial and tax advantages for you. As you do your own planning, please speak with your accountant, attorney or financial advisor to learn more about your gift options.

Legacy Society

The Legacy Society at HopeHealth recognizes individuals who have included HopeHealth in their estate plans through a bequest, life insurance policy, individual retirement account or trust. If you have already included us in your estate plans, we encourage you to let us know so we may recognize your important commitment to our future.

**Thank you for supporting HopeHealth.
Please contact us at (508) 957-0257 or
at Giving@HopeHealthCo.org.**