



# 1919 Legacy Society

An Invitation to Make an Impact on the Future of Health Care in Our Community



# A Better Way for Future Generations

There are a number of ways you can join others in leaving a legacy. Some are very simple. Others are more complex. But the bottom line is that there is a way to meet your needs **and** wishes for family and charitable causes.

We will be happy to learn more about your legacy goals and discuss whether the Gettysburg Hospital Foundation can help you achieve them. Along with your financial and legal advisors, we can help to identify options for your consideration.

We welcome the opportunity to be part of this journey with you.

*Sincerely,*

Kristin Vought  
Regional Executive Director  
WellSpan Philanthropy  
kvought@wellspan.org

**Is it too ambitious to dream that no one will be without adequate health care in Adams County – ten, twenty and fifty years from now? That the residents of this county will enjoy access to the best holistic and integrated care this country can provide?**

Imagine a community where every member benefits from proactive prevention resources and top-notch medical intervention when inevitable illness, disease and trauma strike. Where every woman and man can experience productive activity and nurturing relationships. Where the best of health care allows every teenager and child to develop their potential as tomorrow's leaders.

A growing number of people in our community are partnering with the Gettysburg Hospital Foundation to help us move our community toward this level of wellness.

The 1919 Legacy Society honors Gettysburg Hospital Foundation supporters who demonstrate a special commitment to the future of our mission. By planning a gift to the Gettysburg Hospital Foundation, they help to ensure a continuing legacy of superior health care for generations to come.

**Would you also like to join the 1919 Legacy Society by including the Gettysburg Hospital Foundation in your legacy plans?**



By partnering with the Gettysburg Hospital Foundation, you can leave a legacy that will impact the health of our children, our grandchildren and their children.

This booklet was developed to help you understand the impact of the Gettysburg Hospital Foundation and to invite you to become part of our purpose and promise to make a difference in our community. Please take a few minutes to think about your legacy and consider some giving opportunities that best fit with your ideals.

# What are Your Dreams?

Gettysburg Hospital Foundation has many dreams for improving health care in our community. But when thinking about your legacy, it is more important to start with your dreams, your values and what is important to you.



## Note:

Please discuss your gift intention with our office to ensure that we understand your wishes and can carry them out. We can help you with the appropriate language.

**Do you dream of a time when no person needs to go without health care? When all children establish healthy habits? When communities have easy access to the latest medical treatment and technology close to home?**

These are dreams we share. We are committed to wellness for everyone in our community.

## Are these issues important to you?

Then let's talk. Our commitment is to work with you to discover if there is a mutually beneficial way to create your legacy, one that has meaning for you.

- An unrestricted gift that gives the Gettysburg Hospital Foundation the freedom to use your eventual gift for the most important needs when received.
- A restricted gift that allows you to direct your gift to a specific purpose.
- Endowed funds that generate income annually in perpetuity for our mission for restricted or unrestricted purposes.

# Your Invitation to Become Part of the 1919 Legacy Society



*John and Annie Warner breaking ground for Gettysburg Hospital*

The 1919 Legacy Society celebrates donors who support the future of the Gettysburg Hospital Foundation with a gift from their estate or a life income gift. We invite you to use this booklet to learn about opportunities that might fit your legacy goals and financial plans. You'll also see stories about why other donors

decided to join the vital group of 1919 Legacy Society members.

Members of the 1919 Legacy Society receive:

- The satisfaction of promoting hope, healing and wholeness today and for future generations
- A special listing in the Gettysburg Hospital Foundation's recognition of donors
- Invitations to special events
- Recognition as members of a special group of Gettysburg Hospital Foundation supporters

## **1919 Legacy Society Information**

Located in historic Gettysburg, PA, WellSpan Gettysburg Hospital has been serving the communities of Adams County and northern Maryland for 100 years. The 1919 Legacy Society was established in honor of the year two philanthropic visionaries made an impact on the community's future health care.

In 1919, John and Annie Warner broke ground to build a hospital for the people of Adams County after an outbreak of the Spanish flu killed more than 250 individuals. John Warner, a Gettysburg native and son of German immigrants, held various jobs in the community as a teacher, banker, merchant and chief of the fire company. He married Annie Bream and while they had no children of their own, both John and Annie were very community minded.

Donating six acres of pastureland and \$25,000 toward the establishment of the hospital, Mr. Warner laid the cornerstone of the structure on July 1, 1919 in honor of his wife, Annie. While the building did not admit its first patient until 1921, these two community members saw a need, and they even inspired their friends and neighbors to join them in their charitable endeavors.

While the needs of the community have evolved and advancements in health care have been made, philanthropic giving and leaving a legacy is still a part of WellSpan Gettysburg Hospital's identity as we provide the best quality care, right in your backyard.

Supporting WellSpan Gettysburg Hospital through the Gettysburg Hospital Foundation with an estate or other planned gift will ensure this continued legacy of improving the health and wellbeing of residents of Adams County and northern Maryland for our children, our grandchildren and their children.

*Your stated intention to make a Planned Gift to the Gettysburg Hospital Foundation qualifies you for membership in our 1919 Legacy Society. Your recognition is not based on an amount as few of us know what will be remaining.*

**100%**  
of your gift will go  
towards the program or  
service you designate.

## We Give to Honor History

Born and raised in Adams County, Steve and Linda Renner understand the importance of supporting community institutions that make Adams County a vibrant place to live. Steve, former Gettysburg Hospital President, and Linda, a retired Littlestown third-grade teacher, have seen firsthand how WellSpan Gettysburg Hospital and the community have grown over the years.

Steve especially remembers the day Gettysburg Hospital and York Hospital merged and eventually became what is known as WellSpan Health, because he was a key leader in making that exciting announcement. Steve loves being a part of something that is greater than himself and for him, "it always meant keeping the patients and community members at the forefront of my mind."

Additionally, Steve and Linda both believe in the importance of keeping care local. "I like having my family physician and specialty doctors available in the community," says Linda.

"The local heritage and history of this community, especially at WellSpan



Gettysburg Hospital, is important to us," says Steve. "We want to see health care in this community continue to thrive and grow to meet the needs of future generations." That's why Steve and Linda have planned for their donor-advised fund to eventually fund an endowment. This ensures their giving to the hospital and other beloved charities can continue in perpetuity.

Steve and Linda's generous leadership and giving have created a legacy that will endure to help Adams County residents for generations to come.

# Easy Ways to Make an Impact

## Bequests

A bequest is the most common way of leaving a legacy. A bequest is a gift of cash, securities or other property designated via an estate plan.

- Make a bequest to the Gettysburg Hospital Foundation in your will or trust (a specific dollar amount or asset, a percentage of your estate, or a gift of the balance of your estate);
- Leave all or part of your retirement assets to the Gettysburg Hospital Foundation; or
- Name the Gettysburg Hospital Foundation as owner or beneficiary of a life insurance policy.

## Change of Beneficiary Form

Filling out a “Change of Beneficiary Form” for a retirement account or life insurance policy is a simple process, not requiring changes to your will or trust. More importantly, retirement plans (IRA, 401k, 403b, pension or other deferred plans) are often the largest assets in your estate—and the most heavily taxed. If

you leave these funds to someone other than a spouse, a large portion of these assets might be lost. Simply complete a change of beneficiary form to leave all or a portion of the plan to the Gettysburg Hospital Foundation. Gettysburg Hospital Foundation gets the full value of these funds. You can also recommend the Gettysburg Hospital Foundation as beneficiary of the remainder of your Donor Advised Fund.

## Gifts from your IRA

You do not need to delay a gift from your IRA. The now-permanent Charitable IRA Rollover allows you to satisfy your required minimum distribution, substantially reduce taxable income and support the Gettysburg Hospital Foundation. If you are over age 70½, you can donate up to \$100,000 from your IRA to the Gettysburg Hospital Foundation avoiding any federal income tax on these funds. Our office can assist you with language for requesting your fund administrator to effect this donation.

## Transfer of Other Assets

Common bank accounts (i.e., checking, savings and money market accounts) can be transferred to a beneficiary by completing a “**payable on death**” (POD) form. This allows assets to transfer outside the probate process.

A similar method using a “**transfer on death**” (TOD) form is typically used for stocks, bonds, brokerage accounts, mutual funds and real estate.

## Life Insurance

A gift of life insurance to the Gettysburg Hospital Foundation is a great way to establish a legacy. There are several options:

- Donate a paid-up policy that you do not need as an immediate gift;
- Change the beneficiary designation of a current policy for a future gift to the Gettysburg Hospital Foundation; or
- Purchase a new policy and name the Gettysburg Hospital Foundation as owner and beneficiary.

# I Give to Help Those in Need

Betty Fair spent the final nine years of her career working as a patient financial counselor for WellSpan Gettysburg Hospital before retiring in 2011. Together with her husband, a custodian in the public school system, they raised two children and diligently saved for retirement. But it wasn't their hard-earned nest egg that inspired Betty to make a planned gift to the Gettysburg Hospital Foundation – it was simply a desire to give back to a community that had given so much to her and her family.

“You don't have to be rich to give,” says Betty. “We're certainly not. I assigned a small portion of my life insurance to the Foundation. I feel a relationship with the hospital, and I want that relationship to continue even after I'm gone. I trust the hospital will put the gift toward whatever is needed most at the time.”

In her role as a patient financial counselor, Betty met many people who struggled to make ends meet while facing a challenging diagnosis or a long

course of treatment. On many occasions, she witnessed the Gettysburg Hospital Foundation help patients buy groceries or pay for prescriptions.

“I could have been the one sitting in that chair needing assistance,” Betty reflects. “It's about connecting people to the resources they need, and I wanted to be a part of that. I truly believe that anyone can give, and no gift is too small.”

Philanthropy and volunteering have been central to Betty's life. She helped with the United Way campaign and participated in the hospital's employee giving program. Today, her focus has turned to her family and spending time with her grandchildren.

“I believe in the work the Gettysburg Hospital Foundation does, and I know my contributions will be used to help residents in Adams County.”



“

You don't have to  
be rich to give...

”

# How it Works.



**1** Gift of Cash or Securities



**2** Income Tax Deduction and Fixed Income



**3** Remainder to a WellSpan hospital, facility, program or foundation

## Giving Back that Gives to You

### Charitable Gift Annuities



**A Charitable Gift Annuity offers you steady payments for life with funds eventually going to the Gettysburg Hospital Foundation. This can add an extra measure of financial security in your retirement.**

You can use a range of assets (cash, stocks, bonds, commodities, retirement assets and more). You may be able to deduct a significant part of your gift immediately, and part of the annuity payments you receive may be tax-free.

A deferred annuity can increase the annuity payments. Charitable Annuity Trusts offer additional flexibility depending on your needs.

*For a personalized illustration that demonstrates how a Charitable Gift Annuity might benefit you, contact our office.*





# You Might want to Consider Gifting these Assets:



## Real Estate

A gift of your appreciated property – such as your home, vacation property, vacant land, farmland or commercial property – may be an ideal way for you to leave a lasting legacy.



## Private Business Interests

Donating appreciated stock or bonds is a common and easy way to benefit our mission. It is also possible to donate all or a portion of privately held business interests. This takes more discussion with and assistance from relevant financial and legal professionals. But yes, it is possible, and can make a wonderful gift!



## Farm Commodities

Make a gift of what you grow and harvest, from farm crops like grain to animal products like dairy, honey and more. You can deduct the cost of production from your taxes, and you may qualify for other tax benefits as well.



## Valuable Collections, Mineral Rights

Where there's a will, there's a way. Let's discuss!

## Ready to Impact the Health of Our Community?



### Refresh

your will or other estate plan to document your philanthropic wishes



### Review

beneficiary designations of your retirement plans and life insurance



### Recycle

assets by donating appreciated stock and buying the same stock with a new cost basis to avoid capital gains taxes and expand your giving potential

# Information for Your Professional Advisors



## Thank you for helping your client make a gift to the Gettysburg Hospital Foundation.

Our office is available to assist you and your client in achieving your client's philanthropic goals. We are happy to meet in person, provide sample language for making a bequest to the Gettysburg Hospital Foundation and create a variety of gift illustrations.

*Gettysburg Hospital Foundation is dedicated to improving the health of the local community by supporting WellSpan Health entities based in Adams County and northern Maryland. The Foundation is a community-based, tax-exempt charitable organization under Section 501 (c)(3) of the Internal Revenue Code of 1986, for which a donor is or will be entitled to charitable contribution deductions per IRS guidelines. Donors to the Foundation are encouraged to consult their own professional advisors regarding the deductibility of their gifts.*

**Legal Name:** Gettysburg Hospital Foundation

**Federal Tax ID:** 23-2251358

**Address:** Gettysburg Hospital Foundation  
PO Box 3995  
Gettysburg, PA 17325

**Phone Number:** (717) 337-4175

## Bequest Language

I give the Gettysburg Hospital Foundation, a non-profit organization supporting WellSpan Health entities based in Adams County and northern Maryland, located in Gettysburg, PA, the sum of \$\_\_\_\_\_ (or asset) to be used for its general support (or for the following purpose: \_\_\_\_\_)

Please contact the Gettysburg Hospital Foundation Office regarding language for contingent, residual or other gift language including language for any restricted gifts or for questions about charitable giving strategies.





## I Give to Support Our Community

Jean LeGros generously supports many causes in Adams County with health care high on her list of priorities. While serving on the Gettysburg Hospital Foundation board of directors, Jean witnessed the impact WellSpan Health has on community health and wellness. She also knows firsthand why strong community support is critical to having excellent health care.

Over the years, Jean has had several surgical procedures at WellSpan Gettysburg Hospital. As a patient, she experienced exceptional care and was treated with compassion. She is very grateful Adams County has such an outstanding hospital in our community – one with talented, dedicated health care professionals. “While I have included the hospital in my will, I also frequently make annual gifts to the Gettysburg Hospital Foundation in honor of my physicians who continue to provide such extraordinary care,” states Jean.

Jean’s annual gifts help fund current programs, and her estate gifts will help meet future needs.

“I think it is very important to support institutions in our community,” says Jean. “I have included several local charities in my will. It is a pleasure to have the Gettysburg Hospital Foundation among them.”

As a member of the 1919 Legacy Society, Jean joins many others who include the Foundation in their estate plans, which will continue their legacy of supporting excellent health care for generations that follow.

“Being philanthropic is a value I treasure, and giving is a joy.”

“  
**Being  
philanthropic  
is a value  
I treasure, and  
giving is a joy.**  
”



455 S. Washington St., Suite 11, Gettysburg, PA 17325-0995  
(717) 337-4175 | [philanthropy@wellspan.org](mailto:philanthropy@wellspan.org)

*The information shared in this document is not offered as legal or tax advice. Please consult your legal or financial professional.*