How to Make Charitable Gift Plans That Include CommunityHealth

- **Bequest or trust provisions:** Many individuals find comfort in knowing precisely how their estate will be distributed after death. You can designate all or a portion of your estate assets to benefit family, friends and charitable organizations. This option allows you to make significant gifts to the causes that are important to you without making financial sacrifices during your lifetime.

To make a charitable provision for CommunityHealth, you and your attorney may use the language below in your will or trust:

_I want to join others who support CommunityHealth by designating $_________ or ______% of my estate to CommunityHealth, Chicago, IL to provide funding for (the _____________ department/program at) CommunityHealth. (If my gift cannot be used for that specific purpose at the time my gift is received, my gift may be used to provide funding for the program(s) in greatest need, as determined by the President of CommunityHealth and its Board of Directors._

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- **Maximize your individual and charitable bequests with careful planning:** Since retirement assets passing to individuals other than a spouse are heavily taxed at death, charitable gifts of retirement plan and IRA proceeds have become a popular tax planning strategy. If the IRA funds are paid to a person’s estate, the estate generally pays the income tax. Thus, funds of an IRA are subject to both income and estate taxes. By designating a not-for-profit organization, such as CommunityHealth, as the beneficiary of your retirement plan, your IRA can escape estate and income taxes.

- **Gifts of stock and securities:** A gift of appreciated securities held for more than one year can provide significant benefits to you, as well as CommunityHealth. A gift of stock entitles you to a tax deduction for the market value of the donated stock (not just your cost basis). CommunityHealth can work directly with your broker or financial advisor to facilitate the gift. The best way to make a gift of stock is to transfer the shares electronically from your account to ours. Please have your broker contact Merrill Lynch, Pierce, Fenner & Smith, Inc. at 312-696-7500 and inform them of your wish to transfer stock to:

  CommunityHealth, NFP  
  (Merrill Lynch, Pierce, Fenner & Smith, Inc.)  
  DTC # 5198, directed to CommunityHealth,  
  NFP Account # 7DQ02235
Gifts of Real Estate: Other individuals choose to make a significant contribution to a charitable organization and find that gifts of real estate provide significant estate planning and tax savings benefits. It is possible to make a gift to CommunityHealth while enjoying your home or vacation residence during your lifetime. The gift may even be tax-deductible in the year of your gift. An alternative is to defer your gift of real estate by making a specific bequest of your home in your will/trust.

Thank you for your consideration of making a gift in support of CommunityHealth.
Please call Aleta Rupert, Director of Development, at (773) 959-5942 for additional information.