



**Hospice & Palliative Care
of the Wood River Valley**

A COMMUNITY ASSET
FOR YEARS TO COME...
WITH YOUR HELP.

A LEGACY APPROACH





OUR MISSION

“To provide excellence in end-of-life care and bereavement services.”

A LEGACY APPROACH

Hospice and Palliative Care of the Wood River Valley operates entirely on individual donations, and receives no government funding. This allows us to provide service when, where, and how it is needed, without the restraint of mandate or program restriction.

Although we have been happily successful at raising annual operating funds in the past, planning for the future needs of our community requires that we secure funding in new ways that would be more sustaining than possible through our annual appeal. Generous donors have shown us that this can be accomplished through planned giving.

What is planned giving? Basically it is providing now, for a donation to occur in the future...

- Making a bequest in a will or trust
- Beneficiary designation in an IRA account, 401 k plan, or insurance policy
- Directing a Donor Advised Charitable Fund to make a distribution to us
- Establishing a Charitable Remainder Trust or similar plan

Each of these, and other sophisticated techniques, are available to our donors to provide for the future of Hospice and in many cases to secure significant tax advantages and even provide generous income benefits for the donor.



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SIMPLE BEQUEST

Families that have benefited from Hospice and Palliative Care of the Wood River Valley frequently express their gratitude for our support and want to insure the same quality of service for the future. You can help others to receive our comprehensive services and not deplete the resources you have available to live on by making a simple bequest. You can designate Hospice in your will or trust to receive a bequest upon your death, knowing that you are helping fund our future.

SAMPLE BEQUEST LANGUAGE

I give, devise, and bequeath to Hospice and Palliative Care of the Wood River Valley (Tax ID# 82-0397698) located at 507 1st Avenue N., Ketchum, ID 83340 the sum of _____dollars (\$_____) or _____percent (___%) of the rest, residue, and remainder of my estate, or the following described property:

INSURANCE BENEFICIARY

Another option to leave a substantial gift to honor the care Hospice provided is through an insurance policy. Perhaps you do not have a large estate but do have life insurance. You can name Hospice and Palliative Care of the Wood River Valley as the primary beneficiary of the policy. Upon your death, Hospice would receive the policy proceeds tax free.

208.726.8464

IRA BENEFICIARY DESIGNATION

As you review your estate plan, you may realize that you have an IRA or 401k account that is likely to be significantly impacted by both estate and income taxes. Left to Hospice, however, IRA gifts can avoid all taxes. Talk to your IRA custodian and make Hospice and Palliative Care of the Wood River Valley a beneficiary of your IRA, ensuring that tax vulnerable gifts pass to your charity, and tax-free gifts go directly to your heirs.

DONOR ADVISED FUND

Perhaps you need a substantial current tax deduction, and want to provide a secure income for your favored charities, including Hospice and Palliative Care of the Wood River Valley. Consulting with your tax advisor you may decide that a Donor Advised Fund administered by a large mutual fund company will give you the vehicle you need for the immediate tax deduction along with the peace of mind knowing that you have provided for the long term security of your charities. You can fund your gift with appreciated securities for further tax savings. And, your heirs can continue to advise the Fund after your death.



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GIFTS WITH INCOME

You may be retired and your estate may include a substantial amount of appreciated stock which provides little income. You would like to increase your available income, and make charitable donations to support Hospice. If you sell the stock, capital gains taxes will reduce the amount available for both purposes.

A charitable remainder trust may be the solution. The stock can be donated to the Trust which sells the securities tax free and uses the proceeds to purchase a diversified portfolio of stocks and bonds. You receive an immediate income tax deduction, and during the lifetime of the Trust, you receive a steady income likely greater than the dividends on the donated stock. When the Trust terminates, the remaining funds in the Trust go to the designated charity.

Charitable Remainder Trusts and similar strategies have significant legal and tax implications, and should be considered by donors in consultation with their legal and tax advisors.

GIFTS OF PROPERTY

Gifts of privately held securities, restricted stock, real and personal property can be used to support Hospice. Depending on the nature of the property, a charitable intermediary, specializing in these transactions, may be utilized to complete the sale of the property and transfer of the proceeds to a donor advised fund. The donor's charitable deduction is based on the value of the asset at the time it is contributed.

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FINANCIAL ADVISORS

The strategies outlined here have significant legal and tax implications for the donor, and should be undertaken with the guidance and advice of trusted financial advisors.

We maintain in our office a listing of attorneys, financial planners, accountants and other professionals who have indicated to us their interest in assisting our donors through the complexities of planned giving in light of the donor's personal circumstances.

In addition, several mutual fund companies have established donor advised charitable funds which can be used as part of a comprehensive financial plan.

Please let us know if you would like to review our current listing of such resources.

FROM HOSPICE & PALLIATIVE CARE OF THE WOOD RIVER VALLEY

Our Hospice is a unique model of providing end-of-life care and bereavement services that is envied and respected in the industry. Since 1985, we have diligently worked to establish a reputation of excellence and integrity and be recognized as an integral part of the community and responsive to its needs.

With the support of people like you we have achieved that goal. Now we want to ensure that our future will be as bright as our past...that new challenges in health care will be faced with confidence...that residents of the Wood River Valley will always have access to the same expertise and standard of care that they currently enjoy far into the future.

Consider becoming part of our Legacy Program. Funding our Future...Believing in our Tomorrow.



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**Hospice & Palliative Care
of the Wood River Valley**

*For information about our programs and
services call or visit us:*

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