

MAKING YOUR BENEFICIARY GIFT

Naming Doylestown Health as the **beneficiary or partial beneficiary of your retirement plan** allows you to make an impactful legacy gift, while reserving less-taxed assets for your family and loved ones to inherit.

One of the largest assets in your estate may be your retirement plan, such as a 401(k), IRA, or Keogh. If the beneficiary of these assets is a surviving spouse, it may be possible to defer the start of payments and the resulting income tax. Ultimately, however, all of the distributions from the retirement plan, whenever they occur and to whomever they are paid, are taxable to the person receiving them.

As a sensible charitable alternative, you may choose to name Doylestown Health as the beneficiary of your retirement plan, then use other assets not subject to income tax to make gifts to your heirs. As a qualified 501(c)(3) organization, Doylestown Health Foundation pays no income tax on the distribution, and your heirs will receive their share of your estate without the burden of extra taxes. The process is simple!

HOW TO MAKE A BENEFICIARY GIFT

- 1 Request a "Change of Beneficiary" form from your retirement plan administrator.
- 2 Designate Doylestown Health Foundation as beneficiary at the following address:
595 West State Street
Doylestown, PA 18901

Tax ID Number: 23-2368196
- 3 Inform us of your intentions so we can thank you.

Thank you for choosing to support Doylestown Health.

For more information about beneficiary gifts, please contact Doylestown Health Foundation at 215.345.2009 or Gifts@DH.org. If you have already named Doylestown Health Foundation in your estate plans, please take a moment to notify us so that we may honor you as a member of our Cornerstone Society. Thank you!