

# Forward

Creating Your Legacy. Shaping Our Future.

FALL 2016

## Do You Really Deserve the Best?

**O**f course you do — especially when it comes to your health. The best facilities. The best equipment. The best technology. The best care from highly skilled doctors and nurses.

We strive to deliver the best care for you and your family every day, whether you are a patient at **Addison Gilbert Hospital, Beverly Hospital, Lahey Hospital & Medical Center** or **Winchester Hospital**.

Today's dynamic world of health care is opening up creative opportunities for you to play a role in moving our vibrant hospitals forward, meeting the needs of our

patients and enabling our doctors and nurses to deliver the very best care.

Throughout Lahey's network in New England, patients are reaping enormous benefits of the power of philanthropy, thanks to thousands of donors. You see it in major capital projects — and it directly affects your experiences as a patient.

If you need emergency care in Burlington, you will soon be treated in the new Joseph C. Corkery, MD, Emergency Center, opening in February 2017. Thanks to \$51 million donated by hundreds of benefactors, it quadruples the size

*Continued on reverse*





Thanks to philanthropy, you will soon have access to a new, world-class emergency center in Burlington.

*Continued from front*

of the current space and incorporates the newest technologies and equipment, privacy for patients and families, a behavioral health suite, and of course the lifesaving care of the Lahey team. *Thanks to philanthropy, you will have access to this state-of-the-art facility.*

If you need cardiac care at Addison Gilbert Hospital, its cardiology suite will give you a continuum of cardiology services all under one roof. It is a reality thanks in large part to a challenge from a Gloucester couple. Their gift led to a fantastic response

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**Thanks to \$2.7 million in gifts, Beverly Hospital boasts new, larger operating rooms and the best equipment available.**

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from Addison Gilbert patients who answered the call to invest in this invaluable community resource. *Thanks to philanthropy, patients in Gloucester have comprehensive cardiac care in their community.*

If you need surgery at Beverly Hospital — from minimally invasive

to complex operations requiring hospital stays — you will receive care in a state-of-the-art surgical suite. Thanks to \$2.7 million in gifts, Beverly Hospital boasts this new suite, including access to minimally invasive orthopedic procedures. *Thanks to philanthropy, these facilities and our expert team of doctors and nursing staff are available to you.*

If you are treated for cancer at Winchester Hospital, your healing will be first and foremost at the Center for Cancer Care, a beautiful community-based facility dedicated to an integrated model of cancer care, made possible by \$9.5 million in gifts. *Thanks to philanthropy, you will be treated in this world-class center close to home.*

Many of our donors who support these projects take advantage of strategic planning to maximize their impact through planned gifts. You do not need to be wealthy to provide for the future generations who will depend on your Lahey Health hospital. We hope you will take advantage of opportunities to help us provide the very best for you.

# A Bequest: The Most Significant Gift You'll Ever Make

Do you dream of making a transformational gift? The kind that creates a better future? A gift that leaves a lasting statement to the world about who you are and what you care about?

A gift through your will or trust is:

## ✓ Easy

All it takes is a simple addition to your existing documents. We can provide you sample language to give to your attorney.

## ✓ Flexible

Give a specific asset or a percentage of your estate. Support a particular program or let your gift go where it's needed most. And you can always change or revoke your gift down the road if needed.

## ✓ Memorable

If there's a special person you wish to honor, a gift through your will or trust makes a beautiful tribute gift.

## ✓ Transformational

When you leave a gift in your will or trust to a Lahey Health hospital, you pave the way for a brighter, healthier future for your friends and loved ones.

## The gift that pays you back

How would you like a guaranteed paycheck for life in return for your gift that supports world-class health care in New England far into the future? Our charitable gift annuity is a win-win.



Your benefits include:

- The security of stable cash flow for the rest of your life.
- Higher than average payments compared to CDs and savings accounts.
- Payments that are taxed less than regular income.
- An immediate charitable income tax deduction.
- Capital gains tax benefits when you donate appreciated assets.
- The ability to defer payments to a future date (such as after retirement) when you may need additional cash flow.
- The satisfaction of knowing your gift will benefit our mission for generations to come.

If you'd like to explore this giving opportunity, please contact Brian Coole, who can be reached at [Brian.L.Coole@Lahey.org](mailto:Brian.L.Coole@Lahey.org). We can prepare a personalized illustration for you so you can see what your benefits would be.



# The End of the Year. The Beginning of Your Legacy.

*Any time you contribute to your Lahey Health hospital, you help bring the very best health care to your community. With a little year-end planning, you can get some significant tax benefits for yourself, as well. Here are three ideas to get you started:*

## **1 Give smart, give stock**

When you donate appreciated stock, you get a charitable deduction at the full fair market value, and you pay no capital gains taxes. Sometimes your gift “costs” less than the tax deduction you receive!

## **2 Make a charitable gift that pays you back**

Act soon to establish a charitable remainder trust or a gift annuity before the end of the calendar year, so you can claim your charitable income tax deduction this year. These gift strategies can also help you defer capital gains and lower estate taxes for your loved ones.

## **3 If you're 70½ or older**

You can make a gift directly from your IRA. The transfer counts toward your required minimum distribution, and you do not have to pay federal income tax on it. If you already took your distribution for this year, plan ahead for 2017. *Contact us for easy step-by-step instructions: [Brian.L.Coole@Lahey.org](mailto:Brian.L.Coole@Lahey.org) or 781.744.8975*



# Planning Matters

BY BRIAN COOLE



If you're like me, you appreciate putting a face with a name. I hope this column — and my photo — will give you a sense of me.

I want to thank so many of you who responded to my recent “round tuit” mailing. Some thought it was cheeky, but the overall response was quite positive. (Our funders extended their challenges into 2017. You will hear from me soon with details.)

I had a heartwarming call from a gentleman whose father long ago distributed round tuits to colleagues. Our round tuit brought back many wonderful memories of his creative dad. And I love creativity!

Philanthropy was once the icing on the cake for nonprofits. Today, I see it as *the cake* for major health care projects. Just like thousands of fantastic cake recipes, your participation in philanthropy can be a creative combination of ingredients.

You've read about how philanthropy affects the high-quality care you experience at each of our hospitals and about specific planned gifts that can be ingredients in your support of Lahey Health. Let's talk about how you can help us bake that philanthropic cake for your local hospital.

As a Lahey Health patient, you may have noticed that we never settle for the status quo, and I sincerely hope that you will help us continually move forward.

It's an honor to be part of the team that gives you the excellent care you deserve. I welcome the chance to speak with you about the ways you might prepare now to benefit your hospital later.

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Brian Coole, Director of Gift Planning, can be reached at 781.744.8975 or [Brian.L.Coole@Lahey.org](mailto:Brian.L.Coole@Lahey.org).

## Challenges extended!

Thanks to our generous donors, our challenges will continue into 2017. Stay tuned for more details.





**Lahey Health**

**Office of Gift Planning  
Department of Philanthropy**

41 Mall Road

Burlington, MA 01805-0105

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included.  
Please add a  
stamp.

## Calling All Visionaries

Are you ready to talk about making a gift today that will create community change in the future? Be a member of the Legacy Society.

Hundreds of visionary donors already support **Addison Gilbert Hospital, Beverly Hospital, Lahey Hospital & Medical Center, and Winchester Hospital** with gifts for the future and are members of the Lahey Health Legacy Society.

Some members have turned to Lahey Health for care. Others are family members who are grateful for care a loved one received. All have either given a life income gift, a distribution from a retirement plan or have included a Lahey Health member hospital in their will or estate plan.

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If you would like more information, contact **Brian Coole** at 781.744.8975 or fill out and return the attached reply card.

**Return this card today to learn how a gift to one of Lahey Health's member hospitals could benefit you.**

My member hospital is:

- Addison Gilbert Hospital
- Beverly Hospital
- Lahey Hospital & Medical Center
- Winchester Hospital
  
- I am interested in naming my hospital in my will, trust or as beneficiary of an account. Please send recommended language for leaving a gift in my estate plan.
  
- I have new information that I have not shared with you before — my hospital has been made a part of my estate plan.
  
- Please provide me with detailed information about a gift of at least \$10,000 that would provide income for life while also supporting my hospital.

I prefer to be contacted by:

- Email
- Telephone
- Mail

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PLEASE FOLD ON THE LINE AND TAPE CLOSED.

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Name

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Email

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Telephone (best time to call)

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Address

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City

---

State

Zip Code



**Lahey Health**

Office of Gift Planning

Department of Philanthropy

41 Mall Road

Burlington, MA 01805-0105



Office of Gift Planning  
Department of Philanthropy  
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Burlington, MA 01805-0105

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# SAVE THE DATE

## It's All About You!

Eat Well. Look Good. Feel Great!

### Lahey Health Connections

#### Naples

February 23, 2017  
11:30 a.m. - 2 p.m.

#### Palm Beach

February 24, 2017  
11:30 a.m. - 2 p.m.

Interested? Call us at 781.744.3333.

## CARING FOR YOU

### Hospitals and Medical Centers

Addison Gilbert Hospital  
Beverly Hospital  
Lahey Hospital & Medical Center  
Lahey Medical Center, Peabody  
Winchester Hospital

### Outpatient Centers

Lahey Outpatient Center, Danvers  
Lahey Outpatient Center

### Primary Care

At more than 20 locations

### Specialty Care

Lahey Health at Home  
Lahey Health Behavioral Services  
BayRidge Hospital  
Lahey Health Senior Care  
Ledgewood Rehabilitation  
& Skilled Nursing Center  
Seacoast Nursing &  
Rehabilitation Center  
The Herrick House