

Forward

Create your legacy, shape the future

Winter 2016

Are you up for the Reno Legacy Challenge?



Jack and Suzie Reno have called Winchester home for more than half a century – and they've spent a good deal of that time working to enhance the community, particularly in the area of health care.

The couple's tradition of philanthropy and volunteerism extends throughout their home town, and beyond. It includes founding the Winchester branch of a national nonprofit

that provides academically talented students of color with expanded educational and career opportunities.

Jack and Suzie also have a long history of involvement with Winchester Hospital. Jack served as a member of the Winchester Hospital Board of Directors in the 1990s. Suzie was a founding committee member of Big Steps for Little People, a Winchester Hospital fundraising walk that benefited mothers and newborns.

In 2011, the hospital named them Philanthropists of the Year for their lead support of the new Center for Cancer Care, which houses the Reno Center for Medical Oncology.

On top of their philanthropic efforts for the hospital, Jack and Suzie also know firsthand the exceptional delivery of care Winchester Hospital provides. As patients, they recognize the importance of strengthening Winchester Hospital's future, and they want to challenge other grateful patients to give back as well.

Through the Reno Family Legacy Challenge, the family will match planned gifts to Winchester Hospital made before Sept. 30, 2016, up to \$100,000. The Reno family encourages community members to take advantage of this opportunity to have an even greater impact on health and wellness in Winchester and beyond.

▶ [See challenge details on page 3](#)

Everyone Wins With Planned Gifts

Creative planned gifts are gaining in popularity among friends of Winchester Hospital. These gifts let you:

- ▶ Support a mission you care about in a more significant way than you could with cash.
- ▶ Gain significant tax benefits for yourself and your loved ones.
- ▶ Combine financial planning with charitable giving.
- ▶ Leave a lasting statement about who you are and what is most important to you.
- ▶ Say "thank you" in a meaningful way for what your community hospital has meant to you or a loved one.

As if that weren't enough, another compelling reason was just added to the list. When you make your planned gift this fiscal year, **the Reno Legacy Challenge will contribute an additional 10 percent of your gift's value in your honor.** So not only will you be providing future support for a mission you believe in, you will also deliver immediate support.

A few of the most popular planned giving strategies are highlighted here. But if you have an idea you do not see listed, please contact us. We love creative philanthropy, and we would be happy to discuss your ideas and work together to achieve your financial and charitable goals.

Four Gifts that Rise to the Challenge

1 Honor a loved one with a tribute gift through your will or trust.

This is a simple, meaningful way to leave an enduring statement about who you are and what is most important to you. Don't worry if you already have a will or trust in place. You don't have to redo anything. A simple addition to your existing documents is all it takes. You can leave a set amount, a percentage of the value of your estate after your heirs are cared for, or appreciated assets such as real estate, stock or artwork.

Contact your legal advisor and explain you would like to make a bequest to Winchester Hospital this fiscal year. Act soon because the challenge expires Sept. 30, 2016. Be sure to use the enclosed response form to tell us about your gift so we can recognize you and your loved ones.

Opt out of the voluntary tax!

Did you know that when you designate retirement assets to your heirs, taxes can slice away as much as 60 percent before your loved ones see a penny? But if you make Winchester Hospital the beneficiary of your retirement plan or IRA, the assets go to the hospital tax free! Consider leaving other, less tax-burdened assets to your heirs by leaving your retirement plan or IRA to Winchester Hospital.

2 Make Winchester Hospital a beneficiary with only a signature.

If you've ever opened a bank account, set up a retirement plan or purchased an insurance policy, chances are you completed a beneficiary designation form to indicate who will inherit those accounts. You may not realize you can also designate a charity as a beneficiary. It's the simplest planned gift you can make to meet the challenge.

Contact your bank or plan administrator and ask for a beneficiary designation form. This challenge expires Sept. 30, 2016. Remember to use the enclosed response form to tell us about your plans so we can count your gift as part of the challenge.

THE CHALLENGE

"Jack has never steered away from a challenge. In fact, they feed him."

Suzie Reno, Jack's wife and partner in crime in many ventures they have conquered together.

What is the Reno Legacy Challenge? Through this challenge, the Renos will match a portion of your planned gift with a contribution to Winchester Hospital, up to \$100,000.

Here's how: The Renos will contribute 10 percent of the value of your planned gift, up to \$50,000. If your gift can't be valued, or if you prefer not to disclose the amount of your gift, the Renos will contribute \$1,000.

How do I participate in the challenge? Send in the enclosed response form and tell us about the planned gift you will make this fiscal year or a gift you've already made but never told us about.

What is the deadline? The challenge expires on Sept. 30, 2016. Send in the response form soon so we can make sure your gift arrangements are in place in time to qualify.

Questions? Contact us to learn more.

781.744.2677 | Winchester.PlannedGiving.org

3 Convert life insurance into a gift.

More and more forward thinkers are discovering how to use life insurance to make a charitable gift far beyond what they ever imagined was within their reach. The three most popular ways to convert life insurance into a gift are:

- ▶ Name Winchester Hospital as a beneficiary.
- ▶ Donate a paid policy you no longer need.
- ▶ Purchase a new policy and name your community hospital as the owner and sole beneficiary.

Visit Winchester.PlannedGiving.org for more information about how to use life insurance to make a high-impact future gift that also meets the challenge. This challenge expires Sept. 30, 2016.

4 Make a gift that pays you back.

Friends of Winchester Hospital use charitable trusts and charitable gift annuities to accomplish a range of financial goals. For example, you can secure a guaranteed stream of retirement income for yourself or a loved one, assist with your grandchildren's college tuition, or avoid or reduce your taxes on appreciated assets. It's easy to see why these gifts are so popular. They support our future and yours.

There has never been a better time to make a gift that pays you back. Return the enclosed response form or contact us soon at 781.744.2677. These types of gifts aren't complicated, but they do take some time to set up. Get started now because the challenge expires Sept. 30, 2016.



John Wells, 1918-2015

Sprechen Sie Deutsch?

German Language Unites Winchester Couple

For John and Paula Wells, German was more than a language they spoke and taught. It was what brought them together.

John grew up in Newton, Mass., and attended Harvard in the 1940s. Across the Atlantic, Paula Cullman was living in Berlin. In the early 1950s, Paula left the war-torn city and got a job at the German Consulate of Boston. John was teaching German at Tufts University at the time. Their paths crossed after Paula left the consulate and began doing administrative work for the Tufts University German Department.

As “Frau Cullman,” Paula left an indelible impression on all who met her – especially Professor Wells.

They married in 1978 and moved to Winchester. Over the next 28 years, they traveled the world frequently, but always turned to Winchester Hospital whenever they needed medical attention.

In appreciation for the exceptional care they received, John and Paula funded three charitable gift annuities with Winchester Hospital over the years. In 2007, Paula passed away. In her honor, John made a fourth gift annuity that made possible an expansion of a day surgery unit.

WHAT ABOUT YOU?

If you’ve considered making a future gift to Winchester Hospital, there’s no better time than now. If you make your planned gift this fiscal year, **the Reno Legacy Challenge will contribute an additional gift to Winchester Hospital in your honor, based on a percentage of your gift’s estimated value.** See more details on page 3.



Already Made a Gift?

Did you already make a future gift to Winchester Hospital but never told us? **Now is the time!**

Use the enclosed response form to notify us of your gift plans before Sept. 30, 2016, and your gift will count towards the challenge. If you prefer to remain anonymous, just let us know.

781.744.2677 | Winchester.PlannedGiving.org

The Office of Gift Planning at Winchester Hospital provides support for a full range of charitable gift planning options and services. Winchester Hospital and their employees or representatives do not offer legal or financial advice. All gifts are subject to our gift acceptance policy. To unsubscribe to these mailings, please call 781.744.2677 © 2016 PlannedGiving.com. All rights reserved.

Yes, I'm up for the challenge.

Thank you for supporting Winchester Hospital's future with a planned gift.

And especially thank you for doing it this fiscal year since The Reno Legacy Challenge will match a portion of your planned gift with a contribution to Winchester Hospital up to \$100,000.

Ready to accept the challenge? Tell us how! All types of planned gifts qualify for this match, including bequests, legacy commitments, charitable gift annuities, life insurance policies, retirement fund designations and charitable trusts.

Please return this form no later than Sept. 30, 2016.

I've accepted the challenge by:

- making a tribute gift to Winchester Hospital in my will.
- making Winchester Hospital the beneficiary of a retirement fund.
- making Winchester Hospital the beneficiary of a life insurance policy.
- creating a charitable trust and naming Winchester Hospital as a beneficiary.
- making a legacy gift to Winchester Hospital not listed here.

My legacy gift is in the amount of: \$ _____ or _____ %

- I prefer not to disclose the amount of my legacy gift, but I'm excited to know \$1,000 will be donated to Winchester Hospital as part of the challenge.

I'm interested! Tell me more.

- I would like to receive a personalized illustration of what my payments would be if I were to make "a gift that pays me back" (a charitable gift annuity).
- I am interested in making a legacy gift, but I have questions.
- I've made a gift in the past and would like it to count toward the challenge.

Name: _____ Phone number: _____

This letter of intent represents my commitment to the future of Winchester Hospital.

Signature: _____ Date: _____

Name (please print): _____

Address: _____

City, State, ZIP: _____

Phone: _____ Email: _____