



Planned Giving Guide

*Making a Difference is
Easier than You Think*

We encourage donors to consult their loved ones, professional advisors, and attorney when considering any gift, especially a planned gift. Donors are able to designate their gift to an area of Bon Secours' ministry that is most meaningful to them. The Foundation is committed to honoring donors' philanthropic wishes and will document those wishes in a gift agreement, which is legally binding upon the Foundation.

Planned gifts may be made during your lifetime or beyond. Some common planned gifts include:

- Naming the Foundation as beneficiary of your retirement account or insurance policy
- Making a gift via Charitable IRA Rollover
- Giving appreciated securities
- Giving real estate
- Making a bequest in your estate plan

Identification

Formal Name: Bon Secours Richmond Health Care Foundation

EIN: 54-1201346

Address: 5008 Monument Avenue, Second Floor, Richmond VA 23230

Contact: Ann Carpin, Interim CEO

Email: Ann_Carpin@bshsi.org

Executive Assistant: Diane Raup

Phone: 804-287-7700

Transfer of Securities

Provide the following information to your broker to initiate a transfer. Please inform a foundation representative so that we will expect your transfer and prepare to put it to good use.

Foundation Brokerage Firm: Scott & Stringfellow

DTC Number: 0702

Account Number: 60977940

Representative: Steve Gow

Phone: 804-787-8284

For more information about planned giving opportunities at Bon Secours Richmond Health Care Foundation, please contact the Foundation office at: 804-287-7700 or info_bsvaf@bshsi.org.

The Foundations serving Bon Secours Virginia do not provide legal or tax advice. We recommend that you seek your own legal and tax advice in connection with gift and planning matters. To ensure compliance with certain IRS requirements, we disclose to you that this communication is not intended or written to be used, and cannot be used, for the purpose of avoiding tax-related penalties.