



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 Foundations serving Bon Secours Hampton Roads are committed to honoring donors' philanthropic wishes and will document those wishes in a gift agreement, which is legally binding upon the Foundations.

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

Bon Secours DePaul Health Foundation ● EIN: 54-1843876

Bon Secours Mary Immaculate Foundation ● EIN: 31-1644734

Bon Secours Maryview Foundation ● EIN: 52-1694731

Address: PO Box 55012, Norfolk, VA 23505

Contact: Judy Etheridge Bilicki, Vice President

Email: Julia_Bilicki@bshsi.org

Phone: 757-889-5900

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, please contact the Foundation office at 757-889-5900 or info@bsvaf.org.

The Foundations serving Bon Secours Hampton Roads 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.