



## Planned Giving Guide

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### *Making a Difference is Easier than You Think*

Thank you for considering a gift that will strengthen the Bon Secours ministry for years to come. 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 and may have tax benefits. 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

**Address:** 5008 Monument Avenue, 2nd Floor  
Richmond, VA 23230

**EIN:** 20-1072726

**Contact:** Ann Carpin, President

**Email:** Ann\_Carpin@bshsi.org

**Market Foundation & Board Coordinator:** 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, please contact the Foundation office at: 804-287-7700 or [info\\_bsvaf@bshsi.org](mailto:info_bsvaf@bshsi.org).

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The Bon Secours Richmond Health Care Foundation does 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.