



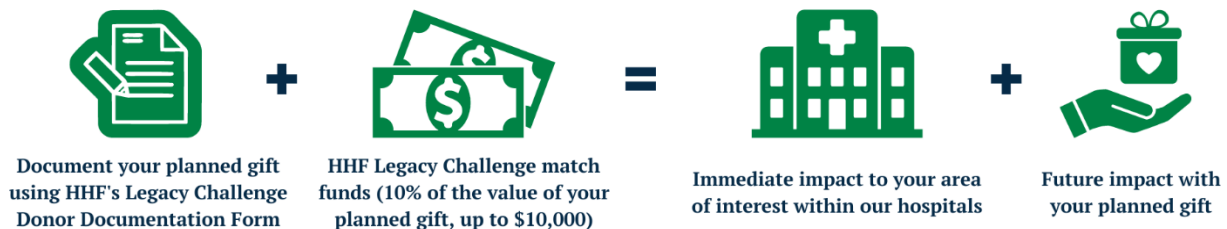
HH HUNTSVILLE HOSPITAL FOUNDATION

HHF Legacy Challenge

What is it?

Huntsville Hospital Foundation's Legacy Challenge is a new way that you can make an impact on your community hospitals – both now and in the future. When you document a planned gift to Huntsville Hospital Foundation (HHF) during this special match campaign, HHF will match 10% of the value of your planned (future) gift with a donation today to benefit the hospital department or program of your choosing. The maximum match is \$10,000.

Planned givers typically do not get to see the impact their gift has on the people they are helping. Through the Legacy Challenge, you will be able to see how your generosity makes a difference **today**. This planned gift will not affect your finances today, but will provide immediate support for one of our Madison County hospitals.



What is the timeline?

June 1 through September 30, 2023 (or while match funds last)

How do I participate?

To join this Challenge, simply make a planned gift and notify us of your intention by utilizing the Challenge Donor Documentation Form. Matching funds equal to 10% of your gift's value (up to \$10,000) will then be directed to an existing department or program of your choice, or you can direct them to the area of greatest need within our Madison County hospitals.

What are planned gifts?

When a donor makes a planned gift, the donor is making a commitment for a charitable gift during a donor's life that will be fully realized after the donor's death.

What types of planned gifts qualify for the match?

Examples include:

- A will or living trust which includes Huntsville Hospital Foundation bequest language
- An IRA or retirement account which includes a distribution to Huntsville Hospital Foundation

- A charitable trust that includes a distribution to Huntsville Hospital Foundation
- Beneficiary designation (in whole or a percentage) of an existing life insurance policy to Huntsville Hospital Foundation, including the life insurance policy provided as part of the Huntsville Hospital Health System benefits package
- Designation of remainder in donor advised funds to Huntsville Hospital Foundation

Please contact us to discuss other options.

What if I want my planned gift to be anonymous?

Please indicate that on the donor documentation form and we will honor your wishes and not disclose your name.

Can I direct the matching funds to a different program than where my bequest is directed?

Yes, that is one of the best features of the Legacy Challenge. The matching funds can be directed to any hospital, department, or program in our Madison County locations, and they do not need to follow the same designation as your bequest.

Can I designate the matching funds in memory or in honor of someone?

Yes, we would be happy to make that designation and inform those you wish to honor or the loved ones of those you wish to memorialize. You may use these matching funds to honor a family member, loved one, Care Champion, doctor, nurse, etc. – anyone you wish.

How do I document my planned gift for the Challenge?

Simply complete the Challenge donor documentation form, which you can download at www.hhfplannedgiving.org. Complete, sign and return it to Lynne Berry Vallely at lynne.vallely@hhsys.org, or by mail to 801 Clinton Ave E, Huntsville, AL 35801. You will receive a thank-you letter for your match and documentation of your planned gift.

Utilizing the donor documentation form is crucial. We want to make sure that your planned gift is utilized as you would like. While you may have more general language in your will, the donor documentation form gives you an opportunity to be more specific. Unless you indicate your desire to remain anonymous, please specify how your name is to read and if you want your gift to be in honor or in memory of someone.

What if the value of my bequest exceeds \$100,000? Will I qualify for more than the \$10,000 in matching funds?

No. We have set a cap of \$10,000 on matching funds and want to be able to motivate as many people as possible to document their planned gifts to HHF.

What if I don't want to disclose how much money I plan to leave to the Foundation with my planned gift?

If you do not disclose the amount of your planned gift, HHF will donate \$1,000 to the hospital, program, or fund of your choice within our hospitals.

To learn more, contact:

Lynne Berry Vallely
 Planned Giving Officer, Huntsville Hospital Foundation
lynne.vallely@hhsys.org | (256) 265-9271