



## Planned Gifts

You also may choose to make Loyola a beneficiary of a future gift. There are many options you can choose from including bequests, life insurance policies, retirement assets and life income gifts.

### Bequests

If you currently have financial responsibilities for yourself and your loved ones, a bequest may be a good option. Your will can stipulate that you will leave Loyola a specific monetary amount, a piece of property or a percentage of your estate.

In a **general bequest** you simply leave a specified dollar amount to Loyola, for example, \$10,000. A **percentage bequest** allows you to leave a percentage of your estate to Loyola. In a **specific bequest**, you designate a specific property you want Loyola to receive. In a **residuary bequest**, you can give Loyola a portion of your property after all debts, taxes, expenses and other bequests have been made.

Regardless of the type of bequest you choose, simply include the following statement in your will:

*To the Loyola University Medical Center:*

*“I give to Loyola University Medical Center, an Illinois not-for-profit corporation, Maywood, Illinois, the sum of \$\_\_\_\_\_ (or \_\_\_\_\_ percent of the remainder of my estate) to be used for the benefit of said Loyola University Medical Center in such manner as the President and CEO thereof may direct.”*

## Life Insurance

If you have a paid-up life insurance policy you no longer need, consider giving it to Loyola at its cash-surrendered value to earn an immediate tax deduction.

## Retirement Assets

Consider making Loyola a beneficiary of your retirement assets including Individual Retirement Accounts and 401Ks. Retirement plans are ideal for charitable giving because they are more heavily taxed than other estate assets. Donating them allows you to give more to your heirs and favorite charities.

## Life Income Gifts

Several methods for making life income gifts exist where you or your designee can receive income while avoiding significant capital gains and estate taxes.

**Gift annuities** are contracts between you and Loyola stating that in exchange for a gift of cash or other property, Loyola will pay you a fixed amount of money each year for the rest of your life. The amount is based on life expectancy; the older you are at the time of the gift, the greater the amount will be.

A **unitrust** pays a fixed percentage (at least 5 percent) of the fair market value of the trusts' assets each year, rather than a fixed sum. This means your income will fluctuate from year to year, but you can expect payments to increase over time.

A **remainder trust** allows you to transfer money or property in trust for the benefit of Loyola. Loyola then makes payments to you or your designated beneficiaries for your or their lifetime, or a period of years not to exceed 20. When the payments end, the assets in the trust pass to Loyola.

A **lead trust** also allows you to provide income to Loyola for either a fixed period of years up to 20, or your lifetime. However, once the payments end the principal balance reverts back to you or your heirs.

## For More Information

Whichever giving method meets the needs of you and your family, there is a team available to guide you through the gift-giving process. To learn more about these and other ways to give to Loyola University Health System or Stritch School of Medicine, contact the Office of Development at:

Loyola University Health System  
Office of Development  
2160 S. First Ave.  
Mulcahy Center  
Maywood, IL 60153  
(708) 216-3201  
development@lumc.edu  
www.luhs.org/giving



LOYOLA  
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Loyola University Chicago

*We also treat the human spirit.®*



# Ways to Give



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*We also treat the human spirit.®*

**W**ould you like to make a difference – to make your mark on the future of medicine? You can assist us in our commitment to excellence in patient care, the education of health professionals and research by being a donor to Loyola University Health System (Loyola) or Stritch School of Medicine (Stritch). Your gift will help Loyola provide top-level care to more patients, educate future physicians in the science and spirit of medicine and



conduct clinical trials that may lead to new therapies or leading-edge treatments.

We know our donors have various reasons for giving. Perhaps you are a former patient, or are grateful that a friend or family mem-

ber received excellent care at Loyola; you have a special interest in research that Loyola is conducting; or you have just heard many good stories about Loyola and are looking for a worthy place to receive your philanthropic dollars.

No matter the reason inspiring you to give to Loyola, you have many choices as to how to make your gift. These options are designed to be quick and convenient for you. Thank you for your gift; we are grateful for your support.

## The Basics of Giving

Your gift may be used for any purpose that contributes to Loyola's health-care priorities. You may direct your gift to a medical education initiative, patient care program or specialty area, or type of research of your choosing. Also, unrestricted gifts that allow Loyola or Stritch to use the funds where they are needed are extremely valuable and appreciated.

### Endowments

While outright gifts help us fund the immediate needs of the health system, endowments help ensure that future projects receive funding as well. An endowment is a transfer of money or property to Loyola with the stipulation that it be invested and the principal remain intact and grow. Loyola uses the interest directly toward the stated gift purpose. An endowment is a gift that keeps on giving.

### Donor stewardship

You will gain more than a good feeling when you donate to Loyola. You will join generations of others who are honored through enrollment in special societies and with naming opportunities.

If you donate at least \$1,000 per year you will be enrolled automatically in The Leadership Society, a group of our treasured friends who share our vision for the continued success of Loyola. Benefits of belonging to the society include a complimentary invitation to an annual dinner.

Another donors' club, The Society of the Shield, acknowledges donors who have decided to remember Loyola through a will bequest or intend to establish a life income plan now to benefit Loyola.

Be assured that your gift will be used for the purpose that you designate. If you request, we can provide reports on how Loyola specifically used your donation.

If you designate your gift for construction or renovation of buildings or the creation of programs, endowments, scholarships or professorships (and the gift is of a certain level), you may be entitled to name the initiative your gift supports. Imagine seeing your name or the name of a loved one or colleague memorialized in a hospital wing or in a scholarship program.

## Outright Gifts

There is no time like the present to make a gift to Loyola. An outright gift will enable us to put the money to good use immediately. Loyola offers many options for outright donations.

### Check or Credit Card

If you would like to make an immediate gift, you can use either a personal check or your credit card. For a donation by check, complete the form at [www.luhs.org/giving](http://www.luhs.org/giving) and mail it with your check to:

Loyola University Health System  
Office of Development  
2160 S. First Ave.  
Mulcahy Center  
Maywood, IL 60153

All checks should be made out to: Loyola University Medical Center or Loyola University Chicago/Stritch School of Medicine.



If you prefer to use your credit card, complete our online form ([www.luhs.org/giving](http://www.luhs.org/giving)) and submit it electronically. Or, call (708) 216-3201 to have an Office of Development staff member process your donation.

### Matching Gifts

Many companies will match their employees' charitable donations, making your contribution even more valuable. Check with your Human Resources office for details.

### Corporate and Foundation Gifts

There are numerous options for corporations, foundations or other organizations to form a charitable partnership with Loyola. To learn more contact the Office of Development at [development@lumc.edu](mailto:development@lumc.edu) or (708) 216-3201.

### Appreciated Assets

Appreciated securities such as stocks and bonds make great donations. The best stocks to donate are those that have increased greatly in value, and produce a low yield. You may receive a charitable deduction for the full fair market value of any security you donate. Since Loyola liquidates the securities, you pay no tax on the sale.

You also may donate any real estate you own. If the property has grown substantially you will gain an income tax deduction and avoid capital gains taxes.

