

# Hope Starts With You



Embrace by Artist Lynnea-Holland Weiss, (Cleveland, OH)

CHARITABLE GIFT PLANNING



**MetroHealth**  
Foundation

# Our Legacy of Care

For nearly two centuries, The MetroHealth System has been a trusted source of healing and hope in Greater Cleveland. We treated our first patients just one year after the city was incorporated – and we've been here ever since, caring for every person who walks through our doors.

Today, MetroHealth is more than a health system. We are a community health leader, a teaching institution, and a hub for innovation and compassionate care.

This legacy has been built not only by our caregivers and visionaries, but also by those who planned ahead to ensure MetroHealth's mission would endure.

By including The MetroHealth Foundation in your estate or financial plans, you can help us continue this legacy – reaching more people, saving more lives and building a healthier future for generations to come.


**Because hope starts with you.**



## WHY CONSIDER GIFT PLANNING

Gift planning is a powerful way to support MetroHealth's mission while also achieving your personal, financial and philanthropic goals. Depending on your goals, your generosity can support:

- ✓ **Compassionate care** that meets the highest standards of clinical excellence
- ✓ **Community-based programs** that address the social drivers of health and expand access to care
- ✓ **Innovative research** that drives medical breakthroughs and improves outcomes for future generations
- ✓ **Education and training** for the next generation of healthcare professionals
- ✓ **Critical resources** that help MetroHealth respond to today's needs while preparing for the future



Gift planning can offer you meaningful benefits – such as tax savings, lifetime income and the opportunity to align your financial planning with your values.

# Hope Can Begin Today

Outright gifts are the most direct way to make a charitable gift. These gifts can be transferred now to The MetroHealth Foundation (MHF), or they can be given over time in the form of a pledge commitment.

Typical assets for outright gifts include contributions of cash, stock, assets, property and more.

**Did you know?** While outright gifts provide immediate support, they can also be part of a broader gift planning strategy, especially when coordinated with your financial or estate planning goals.



*Through the Canopy* by Artist Derek Brennan,  
(Cleveland, OH)

# OUTRIGHT GIVING OPTIONS

Every gift has the power to bring hope to patients, families and communities.



## CASH



Make a meaningful gift via check, money order, cashier's check, credit card (one-time or a monthly sustainer donation) or online at [metrohealth.org/donate](https://metrohealth.org/donate) or by scanning this QR code.



## LOW-BASIS/APPRECIATED STOCK, BONDS AND MUTUAL FUNDS

Converting an appreciated asset into a charitable gift offers you a simple way to use securities for a charitable purpose, receive a deduction for fair market value, and avoid capital gains tax. Direct your broker to transfer securities using the appropriate account information provided by MHF.



## DONOR-ADVISED FUND

Use your established donor-advised fund to support causes that mean the most to you. Ask your fund manager to arrange a distribution to MHF and notify us of your generosity.

# OUTRIGHT GIVING OPTIONS



## IRA ROLLOVER

For donors aged 70½ and older: When you instruct your IRA custodian to transfer funds from your IRA to MetroHealth, you avoid taxation on your required minimum IRA distribution.



## TANGIBLE PERSONAL PROPERTY

Share your enjoyment of a collection or other personal item, such as art or jewelry, by donating it to MHF. If MHF can use the property for its exempt purpose (such as artwork for display in the hospital), your deduction is equal to the fair market value; if the use is unrelated or if MHF plans to sell the property, your deduction is equal to your basis in the property.



## REAL ESTATE

Donating property to MHF, or selling it to us at a bargain price, provides you with an immediate tax deduction and allows you to lessen or completely avoid capital gains tax.



*Strong Like Bull, Black Like Crow* by Artist Perris Mackey, (Cleveland, OH)

# Plan for the Future

Planned gifts allow you to achieve your financial goals while creating a personal legacy rooted in compassion and care. When you include The MetroHealth Foundation in your plans, you become a source of healing and progress for generations to come. Because at MetroHealth, hope starts with you.

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## MAKE PLANNING PART OF YOUR LEGACY



Not sure where to begin? Our free, online estate planning tool – FreeWill – can help you start your will today and create a lasting legacy of hope. Start your free will by scanning the QR code.

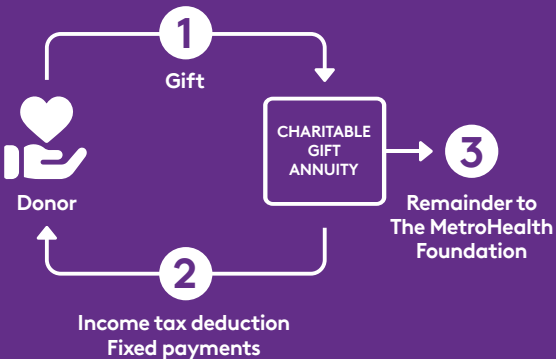
## DEFERRED & LIFE INCOME GIFTS

Life income gifts offer a way to support MetroHealth's mission while receiving income and tax benefits – allowing you to care for your future while planting seeds of hope for others.



### CHARITABLE GIFT ANNUITY (CGA)

Enter into a charitable gift annuity contract with MHF that pays a set amount for either one or two individuals. This provides you with current and future savings on income taxes and gives you fixed payments for life.



### CHARITABLE REMAINDER ANNUITY TRUST (CRAT)

Secure a fixed income and supplement your retirement funds by creating a charitable trust that pays you a set income annually, with the remainder passing to MHF. This offers you fixed payments for life and an immediate income tax deduction.

# TESTAMENTARY GIVING

A legacy gift through your estate plan is a powerful way to ensure that your values live on – and that hope continues to reach those who need it most.



## WILL OR TRUST BEQUEST

A bequest in your will or trust is a simple and effective way to leave a legacy without affecting your cash flow and asset base. Work with your attorney to make a provision in your will or trust for a percentage or specific amount to support MHF after you're gone.



## RETIREMENT PLAN ASSETS

When you designate MHF as a beneficiary of a percentage of your 401(k), 403(b), IRA or other retirement account, there will be no income tax due on the donated assets. You can fulfill your charitable intent while leaving more "after-tax assets" available to benefit your heirs.



## PAYABLE-ON-DEATH (POD) AND TRANSFER-ON-DEATH (TOD) DESIGNATIONS

You may name MHF as the beneficiary of titled bank accounts with POD designations and/or brokerage or investment accounts with TOD designations. These transfers occur outside of probate and remain private.

# GIFTS OF LIFE INSURANCE

A life insurance gift is a meaningful way to turn your annual contributions into a legacy of care, compassion and hope.



## LIFE INSURANCE POLICY (FULLY PAID)

Make a large gift with little cost to you by changing ownership of a life insurance policy to MHF. You will use an unneeded life insurance policy for a charitable purpose, thereby qualifying for an income tax charitable deduction based on the present value of the policy or the sum of premiums paid.



## LIFE INSURANCE POLICY (NEW)

Increase the power of your annual gifts to have a significant impact in the future by initiating a new life insurance policy and transferring ownership to MHF. Then make a pledge to MHF (typically paid over five years) to cover the cost of the premiums.

**Here's how it works:**



Donor



Insurance  
Policy



Your Gift

# Create a Legacy That Lives On

The Generations Society honors individuals who have made plans to support MetroHealth beyond their lifetime. By including The MetroHealth Foundation in your estate or financial plans, you ensure that your values and compassion will continue to impact lives for generations to come.

You may qualify for membership if you have named MetroHealth as a beneficiary of:

- a will or trust
- a charitable remainder trust or gift annuity
- a life insurance policy
- a pension plan or IRA
- any other form of deferred gift.

We would be honored to welcome you into this special community of forward-thinking supporters. Because your gift is more than a donation – it's a promise of hope.



*Summer Twilight* by Artist Susan Danko,  
(Cleveland, OH)

## ABOUT THE ARTWORK

*The artwork featured in this brochure is part of the MetroHealth Glick Center art collection, curated by the Center for Arts in Health in collaboration with LAND studio. This collection reflects MetroHealth's commitment to hope, healing and community.*

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# Hope Starts With You

As you explore the many ways to support The MetroHealth Foundation, remember: Hope starts with you. Your generosity can help us deliver exceptional care, expand access and build a healthier future for all. We can help inform your decision to give in ways that maximize your goals, minimize cost and make a lasting difference.

If you or your advisor(s) would like more information, please contact:



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**MetroHealth** Foundation

If you wish not to receive any fundraising communication supporting The MetroHealth System or The MetroHealth Foundation, please contact The MetroHealth System's Office of Strategic Philanthropy by email at [mhdevelopment@metrohealth.org](mailto:mhdevelopment@metrohealth.org) or by phone at **800-325-5606, ext. 85665** (calling from Ohio) or **800-554-5251, ext. 85665** (calling from outside Ohio).