

THE POWER OF

Planned Giving

The long-lasting impact of gift planning is exemplified by the story of Jean Hughes Brewster, born in Latrobe in 1890. Her father, Dr. John Wilson Hughes, served as a surgeon during the U.S. Civil War before becoming one of Latrobe Hospital's founding doctors.

While Mrs. Brewster made her life in Chicago, she honored her father's legacy. Unbeknownst to Latrobe Hospital, Mrs. Brewster established a charitable remainder trust which provided her with lifetime income, provided her two nephews with lifetime income at her passing at age 88, and, at the nephews' passing, is now providing Latrobe Hospital with annual income for the next 20 years. Her estate's remainder will then be transferred in its entirety to Latrobe Hospital.

Mrs. Brewster lived through the Spanish Flu of 1918 and today her gift helps our patients during the COVID pandemic. Her legacy to honor her father will continue to make a positive difference at Latrobe Hospital.

Her gift provided for her family for two generations, is now helping provide community healthcare, and will continue to make an impact for decades to come. This is the power of planned giving.

About the Foundations of Excelsa Health

Excelsa Health is aided in achieving its mission by two supporting foundations, each guided by a volunteer board of trustees and officers. Our foundations have a unique challenge – to secure necessary financial resources to provide our health care professionals with the tools they need to improve the health and wellbeing of every life we touch.

The Latrobe Area Hospital Charitable Foundation was established as a 501(c)(3) in 1995 with its main goal of supporting Latrobe Hospital and the communities it serves.

The Westmoreland/Frick Hospital Foundation was formed in 2002, and acts as a singular 501(c)(3) organization in support of Westmoreland Hospital and Frick Hospital and the associated services provided.

Excelsa Health's foundations have championed good health, disease prevention and community wellness. Legacy donors have aided our foundations to purchase state-of-the-art operating room equipment, enabled the remodeling of critical care floors, the enhancement of maternal-child services, the overhaul of hospital pharmacies, the acquisition of leading-edge cancer treatment modalities, and the construction of a modern, multi-specialty training environment for the health system's Family Medicine Residency program.

Support Our Mission And Leave A Legacy

We encourage you to consult your financial and legal advisors on how a planned gift would fit into your overall plans.

Legacy gift donors will be permanently recognized in hospital foundations publications and on a permanent wall.

For more information, contact
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ExcelsaHealth.org search **FOUNDATION**


IAH Charitable FOUNDATION
A Healthcare/Community Partnership

WESTMORELAND/FRICK
HOSPITAL FOUNDATION

Planned Giving

CREATE A POWERFUL LEGACY



Excelsa Health
Expert Care. Here.

What Is A Planned Gift?

A Planned Gift is a personal and meaningful contribution that affords you the opportunity to give in a way that will leave a lasting legacy for you and your family, as well as the thousands of patients and community members at Excelsa Health that will be influenced by your generosity.

Why Give?

Your giving can support what matters most to you at Excelsa Health and the foundations are here to help you leave a legacy for the people and priorities closest to your heart.

Thousands of individuals benefit from the latest innovations that medical technology has to offer. Whether a bequest in your will, a beneficiary remainder of an IRA or a 401(k), a gift of appreciated assets like stocks or a tax-smart opportunity that generates income for you and your loved ones, the possibilities to make a difference for the health and wellbeing of your family, friends and neighbors are endless for generations to come.

You Don't Have To Be Wealthy..... Everyone Can Make A Meaningful and Lasting Gift.

YOUR GIFT	HOW TO MAKE YOUR GIFT	HOW YOUR GIFT BENEFITS YOU
WILL/BEQUEST	Working with your legal and/or tax advisor, name one of Excelsa Health's foundations in your will incorporating the following language: "I give, devise and bequeath to (Latrobe Area Hospital Charitable Foundation or Westmoreland/Frick Hospital Foundation)... <ul style="list-style-type: none"> • a portion of my residuary estate equal to %, or • the sum of \$, or • the following described property:" 	Your donation is exempt from federal estate tax and allows you to have complete control over your assets and the ability to make any adjustments you desire.
IRA CHARITABLE ROLLOVER	If you are 70 1/2 years old or older, directly donate from your IRA (up to \$100,000) to one of Excelsa Health's foundations.	Your donation is not included in your adjusted gross income and is free from both income and estate taxes.
GIFT OF RETIREMENT ASSETS	Name one of Excelsa Health's foundations as the primary or contingent beneficiary of part or all of your qualified retirement plan or IRA.	Your heirs realize a cost savings on your assets. Eliminates all federal income and estate taxes.
GIFT OF LIFE INSURANCE	Contribute a life insurance policy you no longer need and/or name one of Excelsa Health's foundations as the beneficiary.	You receive a tax deduction on your income and possible future deductions through gifts to pay policy premiums.
GIFT OF REAL ESTATE	Donate a property to one of Excelsa Health's foundations.	You receive an income tax charitable deduction for the full fair market value and avoid the hassle of selling the property.
RETAINED REAL ESTATE	Designate ownership of your home to one of Excelsa Health's foundations but retain occupancy for life.	Retain the use of your residence for your life and/or another person's life and receive income tax savings through a charitable deduction.
OTHER PLANNED GIVING OPTIONS <ul style="list-style-type: none"> • Charitable Remainder Trust • Charitable Gift Annuity • Charitable Lead Trust 	With your accountant and attorney, create a trust that can pay fixed or variable income to Excelsa or you annually with the principal being retained for beneficiaries, which may be one of Excelsa's foundations or your heirs, depending upon the specified trust.	Trusts feature immediate tax deductions, lower estate taxes, and retirement income. Your tax accountant and attorney can help you to determine which trust would be most beneficial.