



WHAT WILL YOUR **LEGACY** BE?




POMONA VALLEY HOSPITAL
MEDICAL CENTER
FOUNDATION

A passion for healing. A love of giving.

BE PART OF OUR MISSION OF CARING

PVHMC is transforming the diagnosis, treatment and prevention of a wide range of illnesses, with a full scope of primary care and highly specialized services. This would not be possible without the generous support of friends like you. Each of our Hospital Centers of Excellence relies on philanthropy to purchase state-of-the-art equipment and deliver innovative programs that advance healthcare. Your heartfelt gifts help us continue this mission of caring for our community.

Our Mission

The mission of Pomona Valley Hospital Medical Center Foundation is to raise funds to further the objectives of Pomona Valley Hospital Medical Center and make an impact in the lives of our patients.

SUPPORT HEALTHCARE TODAY AND FOR GENERATIONS TO COME

When you make a legacy gift to Pomona Valley Hospital Medical Center (PVHMC) Foundation, you enrich your life and the lives of future generations.

Gifts we receive go directly toward supporting the Hospital, investing in the latest technologies and cultivating excellence in healthcare. Please join us in our ongoing mission to make a life-saving difference.

GIVE A GIFT THAT GIVES BACK

One of the most meaningful ways to contribute is through a planned gift. A planned gift is a charitable donation that creates a lasting legacy. In addition to providing much needed support for PVHMC, your gift may create financial benefits for you and your family, now and into the future.

Even people of modest means can make a difference through planned giving. Naming PVHMC Foundation as one beneficiary of your will or living trust can have a powerful impact. Your gift, whether it is made now or in the future, stays in the community and supports a local not-for-profit Hospital that has provided exceptional healthcare services for more than 100 years.

MANY WAYS TO GIVE – MANY WAYS TO BENEFIT

You can make a gift today and witness the benefits of your generosity, or you can arrange a gift for after your lifetime. Both offer tax and financial benefits. You can:

- Make a gift that costs nothing during your lifetime through your will or living trust.
- Give appreciated stock now and realize tax savings.
- Donate your house, continue to live there, and get a tax break all at the same time.
- Make a gift that pays you income and protects your assets.
- Make a gift that leaves your cash flow and current financial planning unchanged.
- Give an asset you no longer need or want.





“Several years ago I decided to name the Foundation as the beneficiary of my tax deferred annuity programs. What’s made it special is not only the heartfelt thanks I’ve felt for giving, it’s the gratitude the Foundation has shown. Giving and supporting this Hospital and our community is just a good thing to do.”

— Julie Terveer, PVHMC Associate and Donor

GIFTS ANYONE CAN AFFORD

You can support PVHMC Foundation with a gift that doesn’t impact your cash flow, lifestyle or family security.

Gifts From Your Will or Trust

- Your assets remain in your control during your lifetime.
- You can modify your gift to address changing circumstances.
- Under current tax law there is no upper limit on the estate tax deduction for your charitable bequests.

Gifts From a Retirement Plan

- Assets from your plan pass to PVHMC Foundation after your death.
- You can continue to take regular withdrawals throughout your life.
- You can achieve significant income tax savings.
- You can change beneficiaries if your family’s needs change.

Gifts of Stock and Other Assets

- Receive an immediate tax deduction for the fair market value of securities on the date of transfer, no matter what you originally paid for them.
- Pay no capital gains tax on the transfer when the stock is sold.
- Giving appreciated stock could be more beneficial than giving cash.

Gifts of Real Estate

- Donate residential, commercial or undeveloped real estate.
- Gift your home and continue to live in it for your lifetime or the lifetime of your spouse or other family member, and get an immediate income tax deduction.
- Receive a tax deduction for the fair market value of the real estate.
- Pay no capital gains tax on the transfer.

Gifts of Personal Property

- Your gift of art, antiques, jewelry, etc. is immediately beneficial to PVHMC.
- Receive a tax deduction for the appraised value of your gift.
- Pay no capital gains tax.
- In certain cases, you can use personal property to fund a life-income gift.

GIFTS THAT PAY YOU INCOME FOR LIFE AND/OR CREATE AN INCOME TAX DEDUCTION

Receive income for life while making a substantial gift to PVHMC Foundation

Charitable remainder unitrust

- Pays a variable rate of return to you and/or other beneficiaries you name.
- Provides income for life or a term of up to 20 years or a combination of the two.
- You receive an immediate income tax deduction for a portion of the value of the assets you place in the trust.
- After the trust terminates, the balance goes to PVHMC Foundation to be used as you designate.
- You avoid all upfront capital gains tax on any appreciated assets you contribute to the trust.
- You reduce your estate tax liability

Charitable Remainder Annuity Trust

- Pays a fixed dollar amount to you and/or other beneficiaries you name.
- Provides income for life or a term of up to 20 years or a combination of the two. You receive an immediate income tax deduction for a portion of the value of the assets you place in the trust. After the trust terminates, the balance goes to PVHMC Foundation to be used as you designate.
- You avoid all upfront capital gains tax on any appreciated assets you contribute to the trust.
- You reduce your estate tax liability.

Retained Life Estate

- Donate your home to PVHMC Foundation but live there for life.
- Receive an immediate tax deduction.
- Reduce your estate taxes.



“For fifty years, my wife and I and our six children have received excellent medical care at PVHMC. By giving to the Foundation, we are able to express our gratitude and support the hospital’s innovative care for future patients.

— Eloise & Dr. Norman Cadman, Retired, PVHMC Medical Staff, Emeritus Foundation Board



“The heart center was created in memory of my parents, who were both deeply involved in the Hospital. I learned from my dad that you take from the community what you need and what it has to offer, but be sure you give back more.”

— Bill and Carole Stead, Founding Benefactor, Stead Heart and Vascular Center at PVHMC

RECOGNIZING YOUR LEGACY

The Circle of Friends recognizes those special friends of PVHMC Foundation who have created a legacy for the future of the Hospital. Membership is open to all who have made a provision to include PVHMC Foundation in their wills or living trusts, and to all those who have made a planned gift.



With your permission we will recognize your gift with a permanent listing on the Circle of Friends donor wall at PVHMC, as well as provide recognition in our publications and on our website. You will also receive a distinctive Circle of Friends lapel pin, and invitations as a distinguished guest to special PVHMC Foundation programs and events.

CHOOSE THE BEST GIFT PLAN FOR YOU

While you should consult with a financial and/or tax advisor as you consider any charitable gift, we have several online tools that can get you started. Access these tools on our website, at [legacy.vg/pvhmc/articles/40.html](https://www.legacy.vg/pvhmc/articles/40.html). Here you'll find information to help you compare the benefits of different gift plans and begin designing a gift that meets your needs.

MAKING A LEGACY GIFT IS EASY

We invite you to make the gift of a lifetime so future generations can be assured of high quality, compassionate healthcare, right here in our community.

We welcome the opportunity to provide you with a personalized, commitment-free consultation. For more information or to schedule an appointment, contact:

James Dale at 909.469.9408 or james.dale@pvhmc.org.

Glenda Ferguson at 909.865.9659 or glenda.ferguson@pvhmc.org.

Our Sincere Appreciation

We are thankful for the continued support of our many community friends and partners who contribute so much through philanthropy and volunteerism.

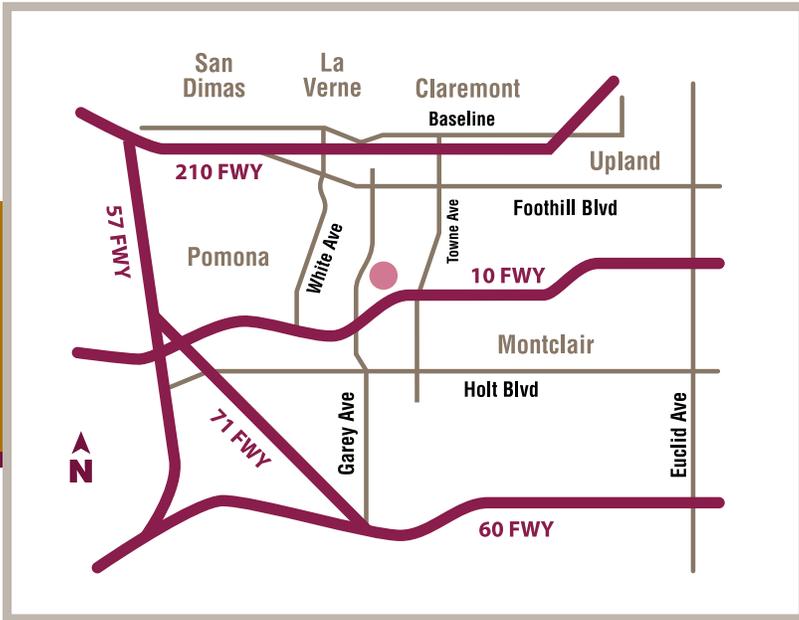


JACK FULTON
— PLANNED GIVING
HONORS HIS MEMORY

In 1948 Jack Fulton received his first professional opportunity at Pomona Valley Hospital Medical Center. This launched a distinguished career in which he made a lasting difference as a hospital administrator, insurance professional and consultant.

Jack shared PVHMC's vision to meet the community's need for quality medical care and he generously included the Hospital in his charitable giving. In 2009, he sadly lost a battle with cancer but his legacy lives on. A major planned gift to PVHMC Foundation from Jack's estate honors both his memory and his regard for the Hospital.





Nationally recognized, Pomona Valley Hospital Medical Center is the area's leading provider of comprehensive healthcare with centers of excellence in cancer, heart and vascular, and women and children's services. We also have an award-winning emergency department and neighborhood health centers for quality healthcare close to home. Through our expert physicians and advanced technology, we offer the perfect blend of state-of-the-art medical treatment and personalized care.

Scan with your smartphone for more info:



A passion for healing. A love of giving.

1798 N. Garey Avenue, Pomona, CA 91767
 909.865.9139
 pvhmc.org