

What Do You Value Most?

Taking time to think about and document what's important—and why it's important—can help you connect more deeply with the people and places you hold dear.

For example, caring supporters of Samaritan Medical Center are committed to the health of our community.

Here are some ideas for how you can forge more meaningful connections and pass along your generous spirit.

- **Have you done an activity recently that made you happy?** Consider a cause related to that activity. For example, if you enjoy a particular hiking trail, find a local conservation group to support.
- If you feel connected to a **current event**, see if nonprofits you support are responding and ensure they are set up for success.

- **Go beyond dollars and cents.** Volunteering is a great way to give back, especially for local charities that may not have the administrative staff that their larger counterparts have. Also, inviting friends and family can be an effective way to introduce them to your passions.
- **Your values can unlock others' generosity.** Letting loved ones know what you care about can help you connect. It could even bring them to support the causes you cherish.

Tell your story by keeping a running document (a generosity journal or ethical will) that gives an account of who you gave to, why you gave to that nonprofit, how it made you feel and how that nonprofit's mission fits into your overall value system.

To learn more about ways a gift in your estate plan can make an impact for our patients and their families, contact Beth Fipps today.

Step-by-Step Planning

Having a solid plan is the best way to help you and your loved ones rest easy about the future. Creating your estate plan also gives you a chance to consider your long-term plans for Samaritan Medical Center. Our FREE guide, **Your Personal Planning Road Map**, lays out the process in a simple, step-by-step manner. Simply complete and return the enclosed reply card to request your copy.



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VISION

The Samaritan Medical Center Foundation will be a philanthropic priority in our community as a result of its excellence, integrity and investment stewardship, and will build an endowment, the income from which will support the capital and program needs of Samaritan.

If you wish to be removed from our mailing list, please let us know.

FOUNDATION *for the* FUTURE

A Financial and Charitable Planning Guide From the Samaritan Medical Center Foundation of Northern New York, Inc.

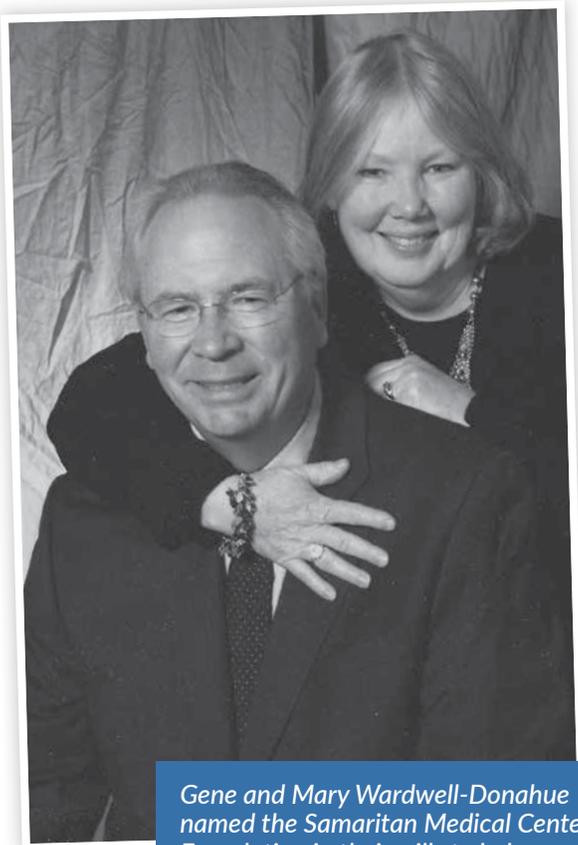


Ensuring the Future of Quality Care

Mary and Gene met at Northwestern night school. He was a policeman going to college on the GI Bill. She was a nursing student at the University of Illinois doing some electives at night. "I think that girl back there likes you," said Gene's friend Ernie. Fast forward and soon they will be married 50 years.

The Donahues relocated to Northern New York, where Mary's family had deep roots, in 1983. Her family resided in Watertown for many years and received care, taking advantage of various healthcare services at Samaritan. They felt it was important to give back in service to the hospital that cared for their family so well in so many ways. Both Mary's grandmother and uncle served on the Board of Trustees for Samaritan Medical Center.

Mary began her career at Samaritan in the Intensive Care Unit (ICU) as a registered nurse and Gene worked for New York State as a parole supervisor. Now retired, Mary brings her nursing expertise and unique perspective to the healthcare institution by currently serving on the Samaritan Medical Center Foundation Board of Trustees, the Samaritan Medical Center Board of Trustees, the Samaritan Summit Village Board of Directors and the Samaritan Keep Home Board of Directors.



Gene and Mary Wardwell-Donahue named the Samaritan Medical Center Foundation in their wills to help others experience the same level of care they have over the years.

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Ensuring the Future of Quality Care

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Mary also periodically attends quality meetings for the hospital, offering her invaluable insight and opinions, which she said makes her feel like she is still in nursing. "I feel strongly that nursing has many contributions to make at a trustee level. I feel it is a way to give back to the community after a hard, but wonderful 40 years as a nursing manager and a bedside caregiver," Mary said.

Joining the Stevens Society was an easy choice for the Donahues. When updating their wills last year, they were reflecting upon the quality of care both Mary and Gene had received at Samaritan over the years, and currently, and a bequest was made to Samaritan Medical Center Foundation. The Donahues feel that a strong hospital system is essential to the future of quality healthcare and wanted to be a part of that.

To join the Stevens Society, please contact the Samaritan Medical Center Foundation.

The Best Defense Against Uncertainty

Why You Should Plan Ahead

Can't predict what's next? It's tempting to put planning on hold. Unfortunately, loose ends can lead to future stress and rash decisions.

Consider this: Planning under "normal" circumstances allows you to slow down and review your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A well-planned estate helps you:

- **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- **Protect family and loved ones.** An up-to-date estate plan keeps loved ones safe. Reviewing it regularly means adjusting for changes in personal relationships, tax laws, births, deaths and state of residence.
- **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps you keep them in the loop and possibly avoid a tax hit altogether.
- **Continue helping others after your lifetime.** Gifts to the Samaritan Medical Center Foundation may provide you financial benefits in addition to the fulfillment that comes from helping others receive quality care.

WE CAN HELP

By planning your estate now, you not only support your loved ones, you ensure the organizations you care about, like Samaritan Medical Center, continue to receive your support. Contact Beth Fipps, VP, Foundation and Community Services, at 315-785-5785 or efipps@shsny.com to learn more about including the Samaritan Medical Center Foundation in your future plans.



What Did I Forget?

Easily Overlooked Items in Your Estate Plan

If you're taking another look at your existing estate plan, or just starting your planning journey, be sure to include the following items—in addition to a will—to make things easier for you and your loved ones. In most cases, you won't need to involve an attorney.

Be Sure You Have:

- 1. A high-level overview** that lays out the basics of your finances and plans. Include:
 - Where to find your will and other documents, and who the key people are—your agents under the powers of attorney and executors or personal representatives.
 - Financial assets (where accounts are held and who owns them).
 - Insurance coverage (property/casualty, health, life).
 - Property and vehicle information.
 - Regular household bills that you pay.
- 2. A detailed description of your finances** (account numbers, contacts at financial institutions, etc.).
- 3. A personal property memorandum** that is referenced by your will and states how you want property distributed and/or sold. This allows you to assign sentimental or valuable assets to specific people without having to change your will if you change your mind.

- 4. A plan for your pets** to ensure that your furry friends are taken care of. A legally binding pet trust can be created, or you can make provisions in your will for how you want your pets cared for in your absence.
- 5. Your digital estate plan**, which includes online account details.
- 6. Advance directives, powers of attorney and other end-of-life planning tools** to communicate your basic wishes. Add personal messages and detailed plans for your funeral, memorial and other specifics.
- 7. An ethical will**, which is your opportunity to hand down your values in a document or video. Think of it as a personal record of your life—how you've lived it and how you want to inspire others.

EXPLORE YOUR LEGACY AT SAMARITAN MEDICAL CENTER

Wherever you are in the process, your estate plan is a powerful way to further your support of Samaritan Medical Center. Please contact Beth Fipps at 315-785-5785 or efipps@shsnyc.com to learn more.

A copy of our most recently filed financial report is available from the Charities Registry on the New York State Attorney General's website (www.charitiesnys.com) or, upon request, by contacting the New York State Attorney General, Charities Bureau, 28 Liberty Street, New York, NY 10005, or us at 30 Washington Street, Watertown, NY 13601. You also may obtain information on charitable organizations from the New York State Office of the Attorney General at www.charitiesnys.com or (212) 416-8401.