

FOUNDATION *for the* FUTURE

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



Lead by Example—The Legacy of Dr. LaVerne VanDeWall

The three pillars of giving—time, talent and treasure—can be used to describe the principles by which Dr. LaVerne “Verne” VanDeWall lived his life, both personally and professionally. Dr. VanDeWall made a lasting impact through his dedication and selfless service to his family and friends, his church and community, and to his medical profession.

He selflessly gave of his time by leading Bible studies and his commitment to serving God. He spent countless hours in medical leadership roles at Samaritan, most notably as President of the Medical Staff in 2003, 2010 and 2015, and Vice President of the Medical Staff in 2002 and 2009. He also served on the Credentials, the Medical Executive, the Graduate Medical Education, Medical Management and Antibiotic Stewardship committees. He extended his faith, as he often prayed with patients, friends and colleagues.

He gave of his talent to the patients and community members he cared for at the Watertown Internists practice, and trained new doctors through the Graduate Medical Education (GME) program. He served as the Program Director of the Internal Medicine Residency program and the Faculty Supervisor for Samaritan Medical Academic Residency Training (SMART) Clinic.

He gave of his treasure after his death, to the programs he cared deeply for—his church, the Samaritan Foundation Stevens Society and the Philadelphia College of Osteopathic Medicine, because it provided the foundation for his career in medicine.

In 2020, Dr. VanDeWall received the Samaritan Lifetime Achievement Award, honoring and recognizing 27 years of providing care at the hospital and two long term care facilities. It was a blessing to celebrate his life of servitude.

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Jeanne and Verne VanDeWall

3 Reasons Why Legacy Giving Matters

It's possible you've heard that "leaving a legacy" is important to institutions like Samaritan Medical Center.

But what makes legacy giving so different from writing a check or donating online?

Legacy gifts...

1. Focus on the future.

The annual gifts we receive each year are critical. But a legacy gift is a support system we can count on to help us continue providing the state-of-the-art, compassionately delivered community healthcare, for generations come.

Ask yourself: If you could live forever, would you continue helping patients and families served by Samaritan Medical Center? If the answer is yes, a legacy gift can immortalize your support.

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Verne and his wife, Jeanne, a retired Registered Nurse, both worked at Samaritan for many years. Samaritan meant a lot to both of them. Jeannie stated that shortly after they married, they had their wills drawn up and there was never a question for Verne—bequests would be made to his church, his medical college and to the Samaritan Foundation. Verne's legacy will live on through these gifts.

The Samaritan Foundation is so fortunate to have friends like the VanDeWalls, and our entire community was blessed to have Verne's medical talent in the North Country for so long. As an honor and tribute,

2. Don't affect your current finances.

You can take care of yourself and your loved ones now, while strengthening Samaritan Medical Center in the future.

Two popular gift types:

- A gift in your will: A few sentences is all it takes to include us in your will.
- A beneficiary designation gift: Name the Samaritan Foundation as a beneficiary of your retirement plan, IRA, donor advised fund or life insurance policy.

3. Help you recognize Samaritan Medical Center's role in your life

If Samaritan Medical Center has significantly impacted your life, or the life of someone you love, a legacy gift honors that relationship.

Through your legacy gift, you have a special chance to reflect the caring person you are today far into the future. Telling us about this gift now ensures that it's used exactly as you intend.

the Samaritan Foundation will use a portion of the gift to refurbish the main Physician Lounge space at the hospital—a gift that gives back to his fellow colleagues and residents.

We are truly grateful for Dr. VanDeWall's generosity of time, talent and treasure. His legacy lives on with exceptional care provided to our community at Samaritan.

There are many ways you can strengthen Samaritan's future, just as Dr. VanDeWall and Jeannie did. Contact Beth Fipps at to learn more.

A Secret Worth Sharing

Informing Your Beneficiaries Is Essential. Here's Why.

What's the best way to ensure that someone knows you love them?

You tell them.

How can you ensure that a person or an organization knows they meant so much to you that you included them in your estate plan?

Same thing: You tell them.

When we hear the term "estate plan," most think of wills. But estate plans also include the proceeds from assets like these, all of which have designated beneficiaries and pass outside of your will:

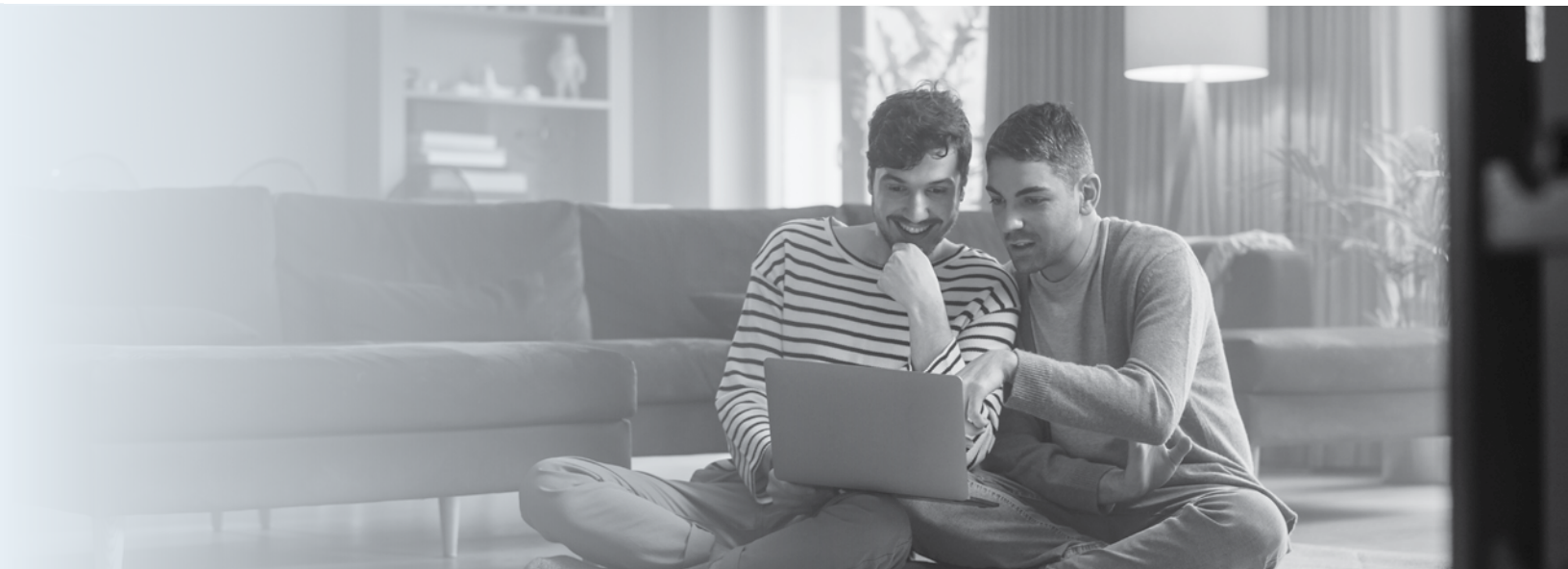
- 401(k) plans and individual retirement accounts (IRA)
- Life insurance policies
- Bank accounts with payable-on-death arrangements

Plan administrators have varying policies for notifying the surviving beneficiaries. Be sure your beneficiaries know about your gift so they can manage the process without undue stress. If your loved ones don't know to contact these companies when the time comes, your money may never get distributed to them.

Don't let this happen to your well-thought-out intentions. Provide your beneficiaries with the asset's name, where it's held, and the account number. That way, they're prepared to act when the time comes.

Making organizations such as the Samaritan Foundation a beneficiary of one of the above plans is a great way to preserve your passion for our critical work supporting community health. If that's your choice, please let us know with a call or email so we can thank you—and take the necessary steps to ensure we carry out your wishes.

We would be honored to help ensure that your legacy reflects your compassion. Contact Beth Fipps at efipps@shsny.com or 315-785-5785 today.



Your 'Why' Can Last Beyond Your Life



"Why" is a word that drives us.

It's more than a question—it defines a connection, a relationship. This also applies to why you're motivated to support excellent healthcare in our community.

The relationship you have with Samaritan Health System is driven by your unique "why." There may be a deeply personal reason or story that compels you to help us deliver the best care to our neighbors.

This is what makes your relationship with us special. You share our values and invest in our mission's longevity. Your "why" and our "why" are the same.

A legacy gift to the Samaritan Foundation carries on our shared values beyond your lifetime. Together, we can ensure that our patients receive extraordinary care for generations to come.

Preserve Your Values

A legacy gift is a meaningful way to share your love, and simpler than you might think. A few words in your will, a short form, a phone call—all are ways you can make a profound difference. We'd love to help!

Share Your Story

We all have values and beliefs that guide our lives. Share these with your loved ones by creating a legacy letter. Our FREE guide **7 Questions to Help Build Your Legacy** can help you get started. Request yours using the enclosed reply card.



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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.