

FOUNDATION *for the* FUTURE

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



The Walkers: Their Vision for Healthcare in the North Country

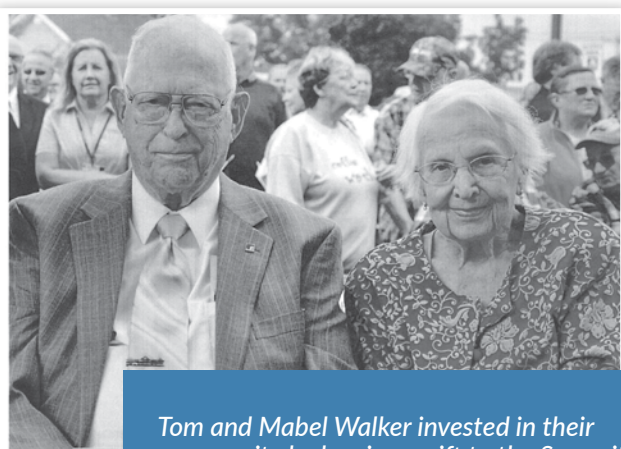
The names Tom and Mabel Walker are synonymous with community leaders, philanthropists, family-first and many more phrases that describe this wonderful couple. As we mourn the recent passing of Tom, we continue to reflect on the couple's impact on healthcare in our region, specifically at Samaritan Medical Center.

Tom was active and engaged as a member of the Samaritan Medical Center Foundation Board from 1996 to 2016. He was a member of several committees and chaired the planned giving initiative for the hospital.

Beyond volunteering time, he and Mabel supported the Samaritan Health System for over 30 years, with the most significant investment in cancer care in our area with the 1993 naming of the Walker Cancer Treatment Center in honor of their two daughters who died from cancer, Wendy and Connie.

When the new center opened in 2018 as the Walker Center for Cancer Care, the Walkers were pleased to continue to witness the investment and advancement

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Tom and Mabel Walker invested in their community by leaving a gift to the Samaritan Medical Center Foundation in their estate.

The Walkers, with son Tom and daughter Laurie, made their most significant investments in cancer care, honoring their two daughters who died from cancer, Wendy and Connie.



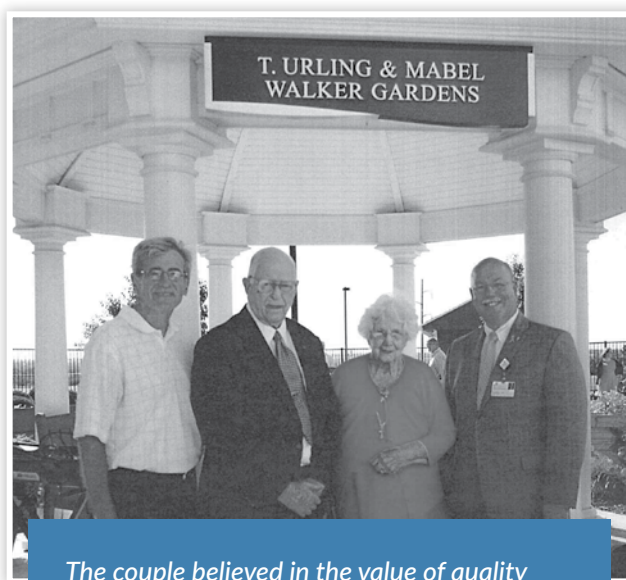
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of cancer treatment locally. The critical need for local cancer care has grown significantly over time, and the Walker family was committed to having this treatment close to home. In 1993, Samaritan cared for 376 new radiation oncology patients, and in 2022 there were 9,134 radiation oncology visits alone.

In 2021, when the Walker Center announced an official partnership with the Roswell Park Comprehensive Care Center, the Walkers were among the first to know and helped us welcome the Roswell team to Samaritan.

The Walkers continued to invest in Samaritan financially by being Samaritan Society members and one of the first Stevens Society members by making their pledge to leave a gift to the healthcare system in their estate. They believed in the progress Samaritan has



The couple believed in the value of quality healthcare close to home and gave their time, financial gifts and support to Samaritan.



Tom, attending Samaritan's annual society dinner.

been making and investing in our community, and their support, even after their passing, will continue to improve healthcare.

The Walkers were thoughtful in the way they invested their time and financial support throughout this entire region. Samaritan was and continues to be a benefactor, and we encourage others to join them with a gift to healthcare. We need people like Tom and Mabel who recognize that a strong and healthy community is directly linked to the quality of healthcare they receive.

Leaving a legacy is a way to ensure quality healthcare for years to come. For information on ways to give, including planned giving options, please call Beth Fipps, VP, Foundation and Community Services, at 315-785-5785 or efipps@shsny.com.

How Will You Feel When You Give?

Have you ever thought about how you feel when you help someone in need? It feels good, even when it's a little thing like giving to someone's online fundraiser.

Giving doesn't just benefit the recipient, it benefits you.

There's a way to give that requires a little more thought and planning, but the rewards can be even greater: designating a gift in your will.

When you give through your will, you are more...

Contemplative

When you decide to help others through your will, you are also planning for your future. This is the ultimate "me time"—your chance to reflect on your life and your values, then consider how you want to use your assets to help the people and the causes that you care about the most.

Connected

When you donate to an organization like the Samaritan Medical Center Foundation in your will, you become part of a family. You become a critical link in a chain of compassion. This collective show of strength can inspire others to join you.

Happy

It's science: Helping others be happy makes you happy, too. Numerous studies describe the "warm glow" effect and "helper's high" you experience when you give, the result of chemicals such as endorphins and oxytocin coursing through your veins. Your blood pressure and stress levels may drop.

Grateful

Those who benefit from your giving will no doubt be thankful, but you may find yourself feeling a sense of gratitude, too. When you reflect on your life and the people and causes you love, you'll recall all those who supported you—the heroes in your life's story.

GIVE TO FEEL GOOD

Your will is a powerful way to show your compassion and feel joyful. To learn more about ways to make a future impact for our patients and their families, contact Beth Fipps at 315-785-5785 or efipps@shsny.com today.



SHARE THE NEWS!

Tell people about the charitable decisions in your will. When someone sees you do a good deed, they're more likely to follow your lead and perform their own act of kindness.

Why Now Is the Time to Update Your Will

When changes happen, it's important that your estate plan reflects them. Here are key categories to consider:

- **Timing:** Did you write your will prior to 2001? A lot has changed in the world of estate taxes. For example, the amount you can leave to heirs without paying federal tax rose from \$675,000 to almost \$13 million in 2023.
- **Relationship status:** A change in your marital or long-term relationship means you may want to alter your will and beneficiary designations.
- **Children:** Perhaps you now have children or grandchildren, and you want to ensure you have provided for them. Or, you created a will when the kids were young and they are now grown and financially stable.
- **Residence:** Legal requirements and taxes vary by state. If you've moved to a new state since creating your will, you'll want to see what impact that may have.

- **Family and friends:** Our connections with people sometimes shift over time. You may want to increase or decrease the amount left to certain individuals, or add or remove them from your will or beneficiary designations.
- **Charitable causes:** If you have formed connections with certain nonprofits and want to take your support to the next level, you can set up gifts in your estate plan to ensure your values endure after your lifetime.

When creating or updating your will and other parts of your estate plan, we hope you consider the role Samaritan Medical Center has played in your life and how you can continue making a difference for years to come. Contact Beth Fipps today to discuss your giving options.

Get Your FREE Guide!

Learn more about remembering Samaritan Medical Center in your will or trust by requesting our free guide ***Make Your Final Wishes Come True***. In it, you'll uncover four ways to make this type of gift and find out if this donation option is right for you. 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.