

# LEGACY CIRCLE

## Bequest and Beneficiary Designation Language

A gift in your will or living trust, known as a charitable bequest, is a simple and flexible way to help Baystate Health attract the best and brightest care providers, deliver unparalleled patient care, provide the latest technology and treatment, and make a meaningful impact on healthcare in this community.

### Specific Bequest

If you already have a will, a phone call to your attorney may be all you will need to add a charitable gift. You may leave a specified dollar amount or a % of your estate to Baystate Health. You may also make your gift in honor of or in memory of a loved one.

### Suggested Language:

I give DOLLAR AMOUNT [or \_\_\_% of my estate] to Baystate Health Foundation, Inc., a charitable organization established by law in Massachusetts (Federal Tax ID#04-3549011), to be used for \_\_\_\_\_ (greatest needs or name of hospital or program).

### Restricted Bequest

You may also direct your gift to a favorite hospital, program or area you would like to support at Baystate Health.

### Suggested Language:

I give DOLLAR AMOUNT [or percentage of my estate] to Baystate Health Foundation, Inc., a charitable organization established by law in Massachusetts (Federal Tax ID#04-359011), to be used for to fulfill the mission of Baystate Health, with a focus on the following purpose: [State the purpose as broadly as possible].

### Examples include providing support for:

Baystate Children's Hospital	Baystate Home Health & Hospice
Baystate Medical Center	Baystate Heart & Vascular Program
Baystate Franklin Medical Center	Baystate Regional Cancer Program
Baystate Noble Hospital	Education & Training
Baystate Wing Hospital	Facilities & Capital Projects
Equipment & Technology	Research
Endowment	Rays of Hope
Patient Care	Greatest Needs

As you consult with your attorney to reflect your goals and intentions, be sure **our correct legal name appears in all final documents as listed below.**

**Legal Name:** Baystate Health Foundation, Inc.

**Mailing Address:** 280 Chestnut Street, Springfield, MA 01199

**Federal Tax ID Number:** 04-3549011

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## Make a Gift through a Beneficiary Designation

Making a gift through a beneficiary designation provides increased flexibility and ease. This is a simple and straightforward way to support our lifesaving work. You may designate us as a beneficiary for a percentage or for a specific amount on the following assets.

- IRAs and other retirement accounts
- Commercial annuities
- Life insurance policies
- Bank or brokerage accounts

### Here's three simple steps to name Baystate Health Foundation as a beneficiary:

1. Contact your retirement plan administrator, insurance company, bank or financial institution for a change-of-beneficiary form.
2. Decide what percentage (1% to 100%) you would like us to receive and name us, along with the percentage you choose, on the beneficiary form.\*
3. Return the completed form to your plan administrator, insurance company, or financial institution.

### Bank or Brokerage Accounts

Keep your bank account and/or brokerage account out of probate and make a meaningful gift to support Baystate Health by adding a transfer-on-death designation to Baystate Health Foundation to your account. Your bank or brokerage firm will add this free of charge. You retain full control of your account and can change the beneficiary if your circumstances change. **Here's what to do:**

1. Contact your bank or financial institution to set up a transfer on death (TOD) designation.
2. Decide what percentage (1% to 100%) you would like us to receive and name us, along with the percentage you choose, on the beneficiary form.\*
3. Return the completed form to your bank or financial institution.

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\* If you are considering directing your gift to a specific purpose, such as to creating a lasting legacy to honor a loved one or to support a specific program or specialty at a hospital, please contact us. We can help with language to ensure your gift is used as you wish. **Thank you!**

**Questions?**  
**Please contact:**

### Baystate Health Foundation

Attn: Kylie Johnson, Director of Planned Giving  
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