



Your Life, YOUR LEGACY

A Planned Giving Newsletter for Friends of
Mary Greeley Medical Center



Giving With Intent

Dr. Claire Andreasen is a professor and director of One Health in the Iowa State University College of Veterinary Medicine. She eats healthy, raises her own vegetables, exercises regularly and takes good care of herself.

Yet during a routine run in late 2016, she noticed a hardening and heaviness in her left breast. Even though she had a mammogram and ultrasound just eight weeks prior that both tested negative, she scheduled a visit with Jessica Siler, PA-C, at McFarland Clinic and was thankful she did.

After another ultrasound and biopsy, she was surprised to learn she had an extremely rare and fast-growing form of breast cancer. Since time was of the essence, a plan of treatment was developed very quickly with oncologist Dr. Debra Prow and surgeon Dr. James Partridge.

Because Claire's form of cancer is rare, she discussed the option of participating in available clinical trials with Dr. Prow. Claire had confidence in her team and moved forward to enroll in a trial to increase the scientific knowledge and effective treatment of this cancer. "The physicians and medical staff worked together so well and took such great care of me," Claire says. During this time, Claire continued to manage all the daily demands of her job at Iowa State. "It was important for me to keep working, and living only about seven minutes from the medical center allowed me to do so," she says.

"Mary Greeley is a true gem in our community. I know being close to the facility and having such a great team prevented me from having a lot of complications."



Dr. Claire Andreasen

Claire's positive experience at Mary Greeley led her to include the medical center in her estate plan. She has become a new member of the Greeley Society by designating the Mary Greeley Foundation as a partial beneficiary of her TIAA retirement plan. "It was really easy to do," Claire says. "This gift is one way I can express my gratitude for the excellent care I received and help future cancer patients."

Claire continues to have check-ups every three to six months and urges all women to get mammograms and perform regular self-examinations.



You too can make a difference for future patients at Mary Greeley. Contact the Foundation at 515-239-2147 to learn more.

It's Good to Have a Plan

Honor a Loved One

Paying tribute to a loved one, either living or deceased, is a thoughtful, endearing gesture that speaks to the profound influence that person had on your life. If you would like to make a gift in honor of someone, contact the Foundation at 515-239-2147.

FOUNDATION TEAM

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Executive Director

Sheryl Clark

Donor Relations & Corporate Relations Officer

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Annual Fund Coordinator

Planning for the future is always a good idea, no matter where you are in life. It can help you achieve a comfortable lifestyle as well as your personal and philanthropic goals. And we at the Mary Greeley Foundation can help with the latter. We would welcome the opportunity to show you ways you could impact the area most meaningful to you at Mary Greeley Medical Center and benefit the lives of patients at the same time. These planned gifts can be made now to immediately support your passion and our mission, or they can take effect in the future as a way to leave your legacy.

Depending on the gift arrangement you choose, you can:

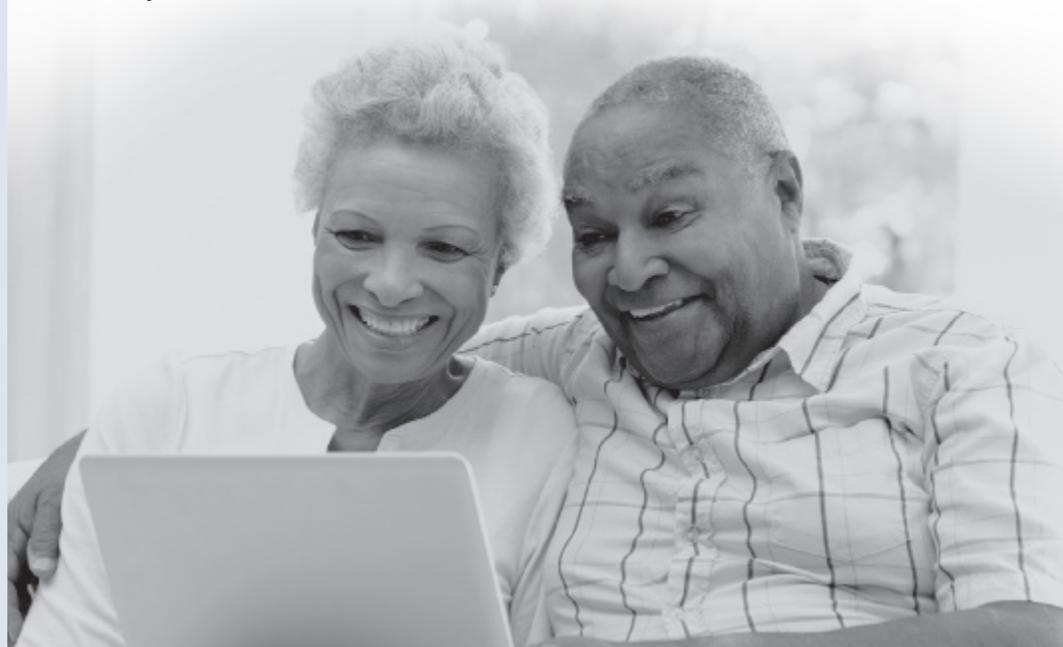
- + Feel secure about the future of your loved ones.
- + Maintain control of your assets for life.
- + Receive tax benefits.
- + Give more than you ever thought possible.

Here are a few popular planned giving options:

Gift of appreciated securities. If you've owned stock for more than a year, and it's increased in value, you may donate the stock directly to us. You may receive an income tax charitable deduction for the full fair market value of your gift when you itemize and eliminate capital gains tax.

Gift in your will or revocable living trust. This can be as simple as including a sentence in your will or living trust. Because this gift doesn't go into effect until after your lifetime, your current budget isn't affected, and you can change your mind at any time.

Gift of retirement plan assets. By naming Mary Greeley Medical Center as the primary beneficiary on the beneficiary designation form for a percentage (1–100) of your account's final value, you can make a tax-wise gift to support us after your lifetime.



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How to Make Giving a Family Tradition

Whether they occur year-round or during the holidays, family traditions help deepen relationships across generations — especially family traditions focused on philanthropy.

When giving to others, children, parents and grandparents come together for a common cause. They decide what issues the family values and then work together to make a difference. The act of giving transitions from an impulse to something purposeful.

Here's How to Start Your Tradition:

- **Begin early:** Encourage small children to donate their toys or participate in a simple charitable activity. As they grow, encourage youth to talk about their interests. Accept that their idea of giving back may differ from yours.
- **Volunteer together:** Participate in family volunteer opportunities in your community. It's a great way to see firsthand who or what your giving supports. Plus, making a difference together feels good.
- **Craft a family vision:** Encourage family members to talk about their giving goals. Solicit input from everyone.

Then together, decide how, where and why you will give.

- **Create ownership:** Provide younger family members with money to make charitable gifts. When they grow older, match their giving 1:1. Creating this sense of ownership can help instill a giving mindset for life.
- **Gauge your impact:** A few times a year, discuss the impact of your philanthropy. This keeps giving on everyone's minds and keeps them motivated.
- **Be flexible:** Periodically, review your family vision for philanthropy. Does it still resonate? Does it need a makeover? Adjust your goals to changing priorities.
- **Give again (and again):** After all, the key to tradition is repetition.



MAKE YOUR TRADITION LAST

Extend your tradition of giving beyond your lifetime — and set an example for future generations — with a gift from your will to the Mary Greeley Foundation. Contact the Foundation at 515-239-2147 for details.

Thank you to the following donors who have established a planned gift benefiting the Mary Greeley Foundation

Greeley Society Honor Roll

Anonymous (4)
Claire Andreasen
Janice and Kenneth Augustine
Sandra and David Austin
Pat and Louis Banitt, M.D.
Beverly Bock*
J. Ben and Sarah Buck
William M. Buck*
Agatha Burnet*
Beverly* and R. Jewell Crabtree
Phyllis Crouse
Linda and John Dasher
Gillian Draper
Garnet Dunn
David Fagle*
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Barbara Forker*
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Rita and Mark Gilbertson
Phyllis and Michael Heffron
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Karen and Robert R. Ravenscroft
Kimberly A. Russel
Janice and Robert Samuelson
Julia* and Wallace Sanders
Sandra Searl
Suzan and John Shierholz, M.D.
Joanne and Ted Tedesco
Mary T. Watkins*

*Denotes that a donor is being honored posthumously.

When you include the Mary Greeley Foundation in your will, trust or other planned giving vehicle, please notify the Foundation office so we can properly thank you and discuss your wishes. [Your confidentiality and privacy are held in the highest regard.](#)

Give From Your IRA

An IRA is an appealing way to save for retirement: Make a contribution and enjoy tax savings. But eventually, that tax bill comes due — when you take your annual distributions and again when you leave your assets to heirs. If you want to avoid the tax bite and make an impact on our mission, then consider a gift to the Mary Greeley Foundation from your IRA.

Make Your Gift Today

If you're 70½ or older, you can use the IRA charitable rollover to make a tax-free gift to the Mary Greeley Foundation. This law allows you to transfer any amount up to \$100,000 annually directly to a qualified charitable organization without paying income tax on the distribution. Additional benefits include:

- + You'll see the difference you're making today.
- + You pay no income taxes on the gift. The transfer doesn't generate taxable income or a tax deduction, so you benefit even if you don't itemize your tax deductions.
- + Your gift can satisfy all or part of your required minimum distribution.

Magnify Your Impact After Your Lifetime

Regardless of your age, you can give from your IRA by naming us as a beneficiary of your account. This is a great option for extending support from your IRA beyond your lifetime.



SECURE PEACE OF MIND

In this age of electronic transactions, it's critical that your personal and financial information are protected. Use our **Digital Estate Protection Kit** to create a record of your passwords and online services. Simply return the enclosed reply card to request your FREE copy today!



Mary Greeley
FOUNDATION

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