



**Giving Health.**

**Giving Hope.**

**Giving Back.**

 **Banner Health®**

Banner Health Foundation  
Banner Alzheimer's Foundation

# Banner Health History



On Sept. 1, 1999, two nonprofit health care systems—Samaritan Health System and Lutheran Health Systems—announced their merger, which would form Banner Health. Today, Banner Health is one of the largest nonprofit health care systems in the country and the leading nonprofit provider of hospital services in all the communities we serve in Arizona, California, Colorado, Nebraska, Nevada and Wyoming.

Recognized for the clinical quality consistently provided to patients in our hospitals, nonprofit Banner Health is headquartered in Phoenix and operates 28 acute-care hospitals, Banner Health Network, Banner – University Medicine, academic and employed physician groups, long-term care centers, outpatient surgery centers and an array of other services, including home care and hospice services, pharmacies, and a nursing registry.

Banner Urgent Care facilities and Banner Health Centers are located throughout the communities we serve to make quality care convenient, accessible and affordable, and to serve those who might not otherwise seek medical care until an emergency.

In 2015, Banner underwent historic growth when it completed a merger with the University of Arizona Health Network to form Banner – University Medicine. This new division of Banner Health includes three academic medical centers in Phoenix and Tucson, as well as specialty institutes in heart, stroke, diabetes and endocrine, bariatrics, women's health, neurology, orthopedics, transplant, and rehabilitation.

**As a nonprofit, Banner Health is responsible and accountable to the communities it serves. Every dollar earned is reinvested in state-of-the-art patient care, technology and medical facilities to meet the health care needs of our communities. Charitable gifts to Banner Health Foundation enhance the patient experience, supporting a wide range of programs and services that would not otherwise exist. Every dollar donated makes life better for our patients and their families.**

# Philanthropy at Banner Health

At Banner Health, we believe in a shared responsibility to improve the health and well-being of our communities. Our nonprofit mission to **make health care easier so life can be better** is made possible by the unwavering support and commitment of our employees, physician partners, thousands of volunteers and many cherished donors who so generously give of their time, talent and treasure.

## **Two foundations support the work of Banner Health:**

Established in 2001, the **Banner Health Foundation** secures and stewards charitable contributions to advance Banner Health's mission.

Established in 2006, the **Banner Alzheimer's Foundation** secures and stewards charitable gifts to advance the mission of Banner Alzheimer's Institute, including groundbreaking research initiatives and pioneering prevention studies, family outreach, counseling and support services.

Many of Banner's patient programs, specialty services and research initiatives are sustained entirely by generous philanthropic contributions from community members like you, who want the very best in health care for themselves and their loved ones.



# Philanthropic Investment Options

As a nonprofit health care provider, Banner Health provides care to everyone—regardless of their ability to pay—and revenue is reinvested into the organization's programs and services. This means that Banner relies on charitable gifts to deliver the innovative programs, excellent patient care, and healing resources that our communities deserve.

Your gifts enable Banner to continue investing in leading-edge technology, groundbreaking research, medical education, an array of community health programs, and the most experienced and caring staff. **You have the power today to make a difference in thousands of lives, for generations to come.**

## Giving is Healing

Whether you support a particular Banner Health hospital, specific patient program, research, or an educational fellowship—every gift to Banner Health makes life better across Arizona. Giving can make your own life better, too. Research has shown that charitable giving promotes recovery, improves health across a number of indicators, and enhances physical and psychological well-being.

Giving is also personal. Our Foundation team starts by listening to you—your experiences, your ideas and your hopes—then introduces you to the Banner Health programs and needs that match your interests.

**Gifts can be designated to support a wide range of programs, many of them within one of the following four priority areas:**



ONCOLOGY



PEDIATRICS



ALZHEIMER'S  
DISEASE



CARDIOVASCULAR  
DISEASE

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**"Living the reality of Alzheimer's as I watched my mother deteriorate over 20 years, I can speak very personally about this disease. And, whatever free time I have, I will spend it trying to help those affected by the disease. My wife, Mary Joy, and I are proud to offer our resources—time, talent, treasure—to the prevention of Alzheimer's, particularly through my role as chairman of the Banner Alzheimer's Foundation board."**

Jerre Stead, Founding Chairman and Donor, Banner Alzheimer's Foundation





## Oncology

Options for supporting the work of Banner MD Anderson Cancer Center's main Gilbert campus and expansion sites around the Valley include:

- **Research** conducted through clinical trials, supporting the discovery of new treatments and giving patients access to the latest breakthroughs
- **Patient Assistance Funds** to help qualifying patients with the cost of diagnostic imaging, radiotherapy, a wig purchase, and local lodging
- **Integrative Medicine programs** that offer complementary therapies, evidence-based alternative therapies, wellness programs, nutrition and exercise programs, and more
- **myCancerConnection®**, a program that pairs those undergoing cancer treatment with a compatible and compassionate survivor with the same or similar diagnosis
- **Disease-specific funds and general funds**, supporting the greatest needs at the Cancer Center, now and in the future



## Pediatrics

Options for supporting our three Banner Children's medical centers in Mesa, Glendale and Tucson include:

- **The Hospital School**, helping children keep up with their studies while receiving in-patient care
- **Toy Closets**, offering children the chance to choose and keep a new toy after undergoing procedures and treatments
- **Music Therapy**, provided at the bedside or in small groups by board-certified music therapists
- **Outdoor playgrounds, healing gardens and indoor recreation spaces** for children of all ages, giving young patients the chance to get fresh air, exercise and relax
- **Child Life** specialists are specially-trained professionals working with children of all ages to reduce anxiety, using medical and play therapy to calm fears, and providing emotional support for parents and young siblings
- **Mobile and Community Clinics**, offering free basic health care services, immunizations and prescriptions to uninsured children
- **Banner Academy**, a nationally accredited private school that educates children on the autism spectrum and those with emotional and learning disabilities
- **General funds**, supporting the most important needs at Banner Children's, even as those needs change over time



## Alzheimer's

Options for supporting the work of Banner Alzheimer's Institute include:

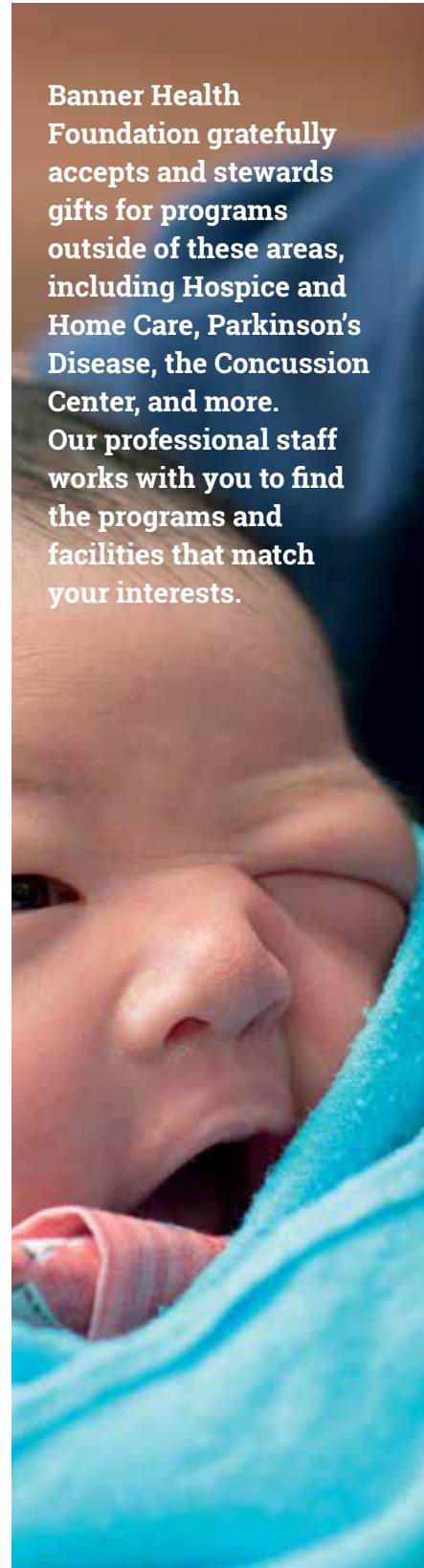
- **Research** aimed at preventing Alzheimer's and dementia
- **Diagnosis and clinical care** in the Stead Family Memory Center in Phoenix and Cleo Roberts Memory Center in Sun City, as insurance does not fully cover the extended time the physicians spend with patients and families
- **Family & Community Services**, including education, resources, support groups and one-of-a-kind life enrichment programs for families of those facing Alzheimer's or dementia
- **Native American Community Outreach**, educating the community about Alzheimer's disease and dementia and caregiving strategies in Tribal communities
- **Grief and Loss programs**, including classes, educational resources, and support groups for caregivers dealing with grief, loss and difficult emotions
- **Funding** to expand Banner Alzheimer's Institute's world-class comprehensive care model to Southern Arizona and support for the provision of clinical and family services



## Cardiovascular Disease within Banner—University Medicine

Options for supporting cardiovascular care in our academic medical enterprise include:

- **Patient care** programs in the areas of structural heart disease, women's cardiovascular health, heart rhythm disorders, advanced heart failure, heart disease prevention, and imaging and heart transplant
- **Endowed Chairs** honor both the donor and the named holder of the appointment and help to attract, reward and retain distinguished faculty of national and international reputation
- **Training and Education** through Cardiology Fellowships provide young physicians broad exposure to diseases, teach appropriate use of diagnostic studies, and require active participation in research projects to give the physician further experience in critical thinking and literature evaluation
- **Research** studies and clinical trials of new heart disease treatments give patients access to the latest investigational medications and therapies today, and advance medical discoveries to benefit future patients

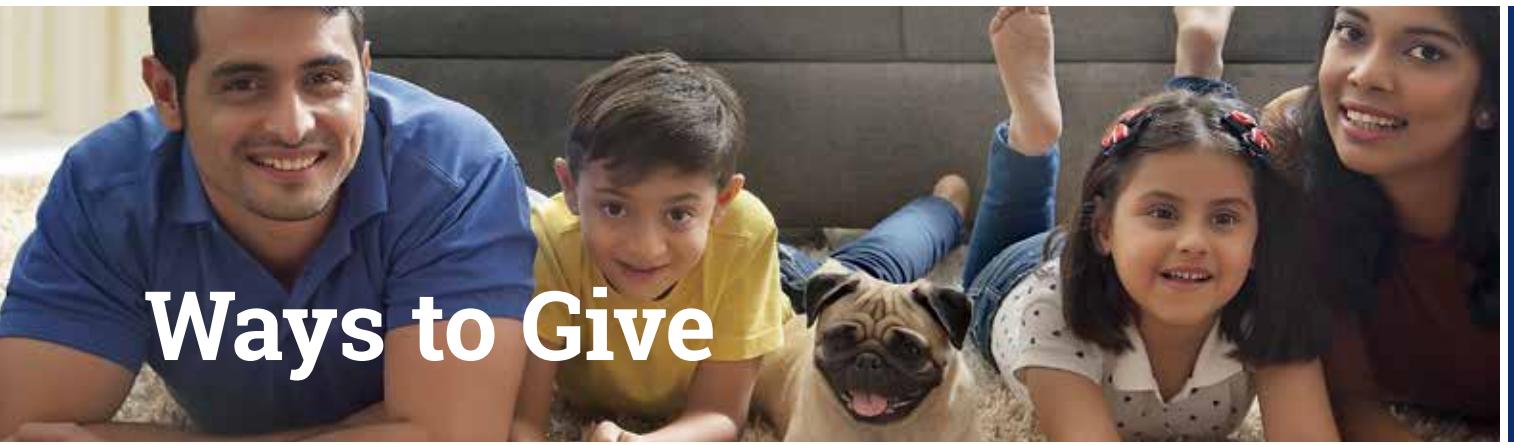


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**"It is the truth that no one fights cancer alone, and among our team of warriors, Child Life holds a very mighty sword. We couldn't imagine going through such a war without them by our side."**

Shelly Maguire, mother of Alaina, a pediatric cancer patient at Banner Thunderbird Medical Center  
Alaina is pictured with her Child Life specialist, Courtney. Child Life is one of many programs sustained entirely by charitable gifts.





# Ways to Give

## Lifetime Giving

### Common Gift Types:

**Pledges:** Sustain important programs by giving on a recurring basis, with payments made monthly, quarterly or annually. For your convenience, payments may be made through automatic bank withdrawal or by credit card.

**Tribute and Memorial Gifts:** Giving is a thoughtful way to celebrate a special occasion or honor family or friends. Memorial gifts honor the memory of a loved one and support important programs at Banner Health. Both may be designated to the facility, area of care, or program of your choosing.

**Gifts of Gratitude:** Honor a Banner employee who made a difference during your hospital stay with a donation in his or her name. Each honored employee receives a certificate commemorating the honor and a Banner Health Hero lapel pin.

**One-Time Gift:** The simplest way to make a gift is by check or credit card.

### Non-Cash Gifts:

**Stocks, Bonds and Mutual Funds:** Giving appreciated stocks, bonds and mutual funds results in a charitable deduction for the full market value and can minimize capital gains tax.

**Real Property:** A home, ranch, business or land can become a significant charitable gift. Avoid capital gains on the property's appreciation and receive a charitable deduction for its fair market value.

**Vehicles:** Banner Health Foundation and Banner Alzheimer's Foundation gratefully accept donations of motorized vehicles including cars, trucks, boats, and RVs.

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## Planned Giving

**Bequest:** Name Banner Health Foundation or Banner Alzheimer's Foundation to receive all or a percentage of your estate in your will or trust.

**Retirement Assets:** Double taxation reduces the value of retirement accounts when passed to heirs or non-charitable beneficiaries. Consider donating all or part of the unused retirement assets in your IRA, 401(k), 403(b), pension or other tax-deferred plan. The Foundation benefits from the full value of your gift and your estate will benefit from a charitable gift deduction.

**Life Insurance:** If you have a life insurance policy that has outlasted its original purpose, consider gifting the policy. Upon your passing, your estate receives a charitable deduction and the death benefit passes to the Foundation tax-free.

**Charitable Gift Annuity:** A contract between you and Banner Health Foundation where, in exchange for your charitable gift, you or a loved one receives income in the form of set payments for life.

**Charitable Trusts:** Various types of trusts offer an ideal way to convert highly appreciated assets into a lifetime income without having to pay capital gains or estate taxes, while also providing a meaningful gift to Banner Health.

# Corporate Giving & Partnership Opportunities

Generous businesses and corporations play an important role in Banner's efforts to meet the health care needs of our diverse state. Through charitable gifts, partnerships and sponsorships, companies of every size and representing every sector help Banner make a difference in the lives of individuals and families when and where they need it most.

## Fulfilling Your Goal to Make a Difference

We know that charitable giving decisions are important to your business. That's why we make it easy to direct your corporate gifts to areas aligned with your company's strategies, mission or industry. Gifts can be directed to any of the following:

- **A Banner Health hospital or medical center** in the community where you do business. Choose a specific patient program or an area of care (such as pediatrics or cancer care), or help renovate and enhance patient areas to make them more welcoming for families;
- **Community programs** such as health education for underserved populations, resources and support for Alzheimer's caregivers, or community clinics for children who lack access to health care, as examples;
- **Research initiatives** aimed at finding cures or preventing particular diseases, or clinical trials giving patients access to the latest breakthroughs and treatments;
- **Special events**, including The Pulse of the City Soiree fundraising gala and our annual Golf Tournament, offer your business visibility in the community and networking opportunities while benefitting one of Banner's signature causes.

With plenty of giving options, you can designate your company's contributions to meet specific corporate social responsibility goals or to support the area of care closest to the hearts of your employees and customers. We work with you to design a custom strategy to suit your vision.



# Giving Societies

Banner Health Foundation and Banner Alzheimer's Foundation gratefully acknowledge the consistent gifts of individuals, families and businesses, and the commitment of those who have remembered Banner Health in their estate plans. With special membership benefits, our Giving Societies include Banner Benefactors, Partners in Wellness and the Legacy Society.

## **Banner Benefactors**

Banner Benefactors are individuals who contribute \$1,000 or more each year, while Lifetime Banner Benefactors are those whose cumulative gifts exceed \$10,000. This distinguished membership program serves to honor generous gifts in support of Banner Health while providing access to exclusive educational events and social activities. Many Banner Health employees are Banner Benefactors, making consistent annual gifts through the employee giving campaign.

## **Partners in Wellness**

Banner Health Foundation and Banner Alzheimer's Foundation gratefully recognize new gifts of \$10,000 or more from corporations, foundations, and local community groups as Partners in Wellness. These generous entities are recognized on our website and invited to an annual celebration.

## **Legacy Society**

The Legacy Society recognizes the generosity and foresight of those who have remembered Banner Health in their estate plan, will or trust. Legacy gifts are promised today and realized after your lifetime. Legacy Society members are recognized in Foundation publications, are invited to all signature Banner Health Foundation events, have the opportunity to engage with Banner physicians and senior leaders and tour Banner Health facilities. While we honor the members of the Legacy Society, we also deeply appreciate the generosity of those who wish to remain anonymous.

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**"My goal is to encourage other people who have been fortunate in life to think about leaving a legacy. Give something back for society."**

John Hardison, a member of Banner Health Foundation's Legacy Society, whose estate gift established a Prostate Cancer Research Fund at Banner MD Anderson Cancer Center



# Quality | Leadership | Innovation

- Banner – University Medical Center Phoenix and Banner – University Medical Center Tucson are tied for the No. 2 spot in *U.S. News & World Report's* ranking of Best Hospitals in Arizona.
- Based on clinical, operational and patient satisfaction data, Banner – University Medical Center Phoenix and Banner – University Medical Center South are among the nation's 100 Top Hospitals, according to IBM Watson Health™.
- In collaboration with its many departments, including Banner MD Anderson Cancer Center, Banner Gateway Medical Center recently achieved the prestigious Magnet™ designation in recognition of its nursing excellence. The American Nurses Credentialing Center's Magnet™ Recognition Program is viewed around the world as the ultimate seal of quality and confidence.
- Banner Alzheimer's Institute is globally recognized for revolutionizing the standard of care for Alzheimer's and dementia patients and their caregivers, and for its pioneering prevention research initiatives.
- Banner Health is consistently named to "HealthCare's Most Wired" list for meeting the highest health care information technology standards.
- Banner Health is the first health care provider in Arizona to use technology to monitor patients from hundreds and even thousands of miles away using Banner Telehealth.
- Each year, more than 800 medical students and 1,000 physician residents receive medical training at Banner's three academic medical centers in Phoenix and Tucson.

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*"As a nonprofit health care system, Banner relies on charitable support to deliver on our mission to make health care easier so life can be better. Because of significant philanthropic investment over nearly two decades, today, our patients can count on receiving the highest quality care from caring professionals in state-of-the-art facilities equipped with the most advanced technology. A wide range of patient programs, health care resources, clinical trials of new treatments and supportive services are available to our patients every day, thanks to the thousands of generous donors who choose to support our work. On behalf of the board of directors, executive leadership and employees of Banner Health, thank you for your generous support."*



**PETER S. FINE, FACHE**  
PRESIDENT & CEO, BANNER HEALTH



## Community Benefit

Banner Health invests some \$711 million annually in the communities it serves, including:

CHARITY CARE AND FINANCIAL ASSISTANCE:

**\$97 MILLION**

UNPAID COST OF PUBLIC PROGRAMS,  
MEDICAID AND OTHER PROGRAMS  
FOR THE UNINSURED:

**\$546 MILLION**

HEALTH PROFESSIONAL EDUCATION:

**\$45 MILLION**

RESEARCH ACTIVITIES:

**\$11 MILLION**

COMMUNITY HEALTH SERVICES:

**\$8 MILLION**

COMMUNITY DEVELOPMENT:

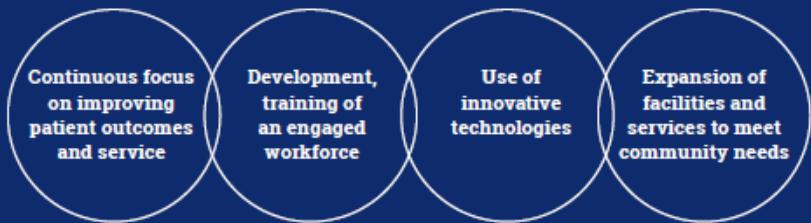
**\$4 MILLION**

## Mission

Banner Health's nonprofit mission is to make health care easier so life can be better.

## Values

Banner is dedicated to strengthening patient care by:



Banner Health Foundation (Tax ID 94-2545356) and Banner Alzheimer's Foundation (Tax ID 20-4862361) are tax-exempt, 501(c)(3) nonprofit organizations. Donations are tax deductible to the fullest extent allowed by law, subject to individual limitations.

*Data based on 2017 expenditures.*

*Please consult your personal advisor(s) on all legal, tax, or financial issues related to your gift or personal matters. Nothing contained in this publication should be considered legal, tax, or financial advice. Content was not written nor intended for, and cannot be used for, the purpose of avoiding tax-related penalties. For information about the specific tax benefits to which you may be entitled through your charitable giving, please consult your tax advisor or attorney.*

[www.bannerhealthfoundation.org](http://www.bannerhealthfoundation.org)



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