







Marty Tanona honored his beloved wife, Arlene, with a gift to Banner MD Anderson Cancer Center, where she spent 135 days while battling cancer.

"I cannot do all the good that the world needs. But the world needs all the good that I can do." -Jana Stanfield, Songwriter

Banner Health Foundation

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Legacy and Estate Charitable Planning With Banner Health | FALL 2019

Gift Honors a Beloved Wife and a Life Well-Lived

Marty Tanona spent his career as a selfless community servant. He was a Coast Guard veteran and firefighter. But his proudest accomplishment was being a doting husband to his wife, Arlene.

The pair traveled the world together, from Canada to the Bahamas, to their favorite Hawaiian island, Kauai. They lived a near fairytale life—until Arlene was diagnosed with an aggressive form of cancer in December 2017.

Together, they spent 135 days at Banner MD Anderson Cancer Center as she battled the disease that would spread from her uterus to her liver, kidneys, and lungs. Arlene succumbed to the disease in August 2018.

Although Marty misses Arlene every day, he looks back on their experience at Banner MD Anderson with gratitude. He appreciates how everyone at the Cancer Center treated Arlene with gentle care and attention, and that, "No matter where, there was always someone there to help."

In Marty-like fashion, one of his last acts will be a selfless one: he has committed to donating 50 percent of his estate to Banner MD Anderson Cancer Center upon his passing. He sees it as the ultimate expression of gratitude, a way to honor his wife's memory, and the chance to create a charitable legacy.

Benefits Now and in the Future

You likely reflect often on the year at hand, but do you spend much time envisioning the future? A solid estate plan is a critical component to protect your family after you're gone. It's also a tool to make a meaningful, lasting difference for the patients and families we serve in our hospitals across Arizona, and it can offer you important financial benefits.

How an Estate Gift Benefits You

Depending on the gift arrangement you choose, you can:

- Reduce your income taxes.
- Reduce or eliminate capital gains tax.
- Defer your gift until after your lifetime, so it doesn't affect current income.
- Give more—and create a greater impact—than you ever thought possible.

Every Gift Makes a Difference

Your gift, in any amount, advances Banner Health's patient care programs, family services, medical research and community health education initiatives. Contact Pat Elder at 602.747.4485 or patricia. elder@bannerhealth.com to learn more about gift options and the best tax-saving strategy for you.

Take Note

To qualify for a tax benefit in 2019 (when you itemize deductions on your income tax return), you must make your gift by Dec. 31. The date used for tax purposes is the day you transfer control of the asset. Here are gift dates by type.

- Checks—The mailing date is the date of the gift.
- Securities—If securities are electronically transferred to Banner Health Foundation or Banner Alzheimer's Foundation, the gift date is typically the day the securities enter our account. If stock transfers are mailed, the mailing date is the gift date.
- Life insurance—The date signed on paperwork transferring ownership to Banner Health Foundation or Banner Alzheimer's Foundation, assuming you properly forward the form to the insurance company.
- Other tangible personal property—The day you deliver the property with a signed document transferring ownership, if necessary.



Pass Down a Legacy of Giving

The greatest gift we can pass down to the next generation is to instill the value of giving back. Showing loved ones that we are part of a larger world—and that what we put into it is what we get out—ensures the next generation understands the importance of philanthropy.

By talking with family members now about your charitable goals, and engaging in acts of service, you become a role model and inspire others to follow your lead.

Start the Conversation

Set aside time or use everyday moments to talk about what it means to be charitable.

- Share your vision and goals for Banner Health Foundation or Banner Alzheimer's Foundation and others you are passionate about.
- Ask family members which causes are important to them and how they show support.
- Request that your family consider their role in your own charitable giving plans.

Take the Next Step

Discuss taking your commitment to the next level.

- Consider volunteer opportunities with organizations, like the Banner Health hospital in your community, that your family would like to support.
- Start charitable family traditions.

Solidify Your Plans

Discuss ways to fulfill your philanthropic aspirations.

- Contact us to inquire about volunteering or other ways you can help.
- Leverage your estate plan to carry out your charitable wishes beyond your lifetime.

For more ideas about how to engage younger generations in the act of philanthropy, contact Pat Elder at 602.747.4485 or patricia.elder@bannerhealth.com.

Nurture the Giving Spirit

Do Good, Together

Volunteering as a family cultivates closeness while helping others; it also develops empathy, gratitude and responsibility.

Get Them Involved

Children can help walk dogs or put clothing into bags to donate; simple acts build the foundation of giving.

Donate Goods or Money

Let children see you in the act of giving away clothing or writing a check; doing is the best motivator.



Making Memories Last Forever

When someone close to us passes away, celebrating the person's life and reflecting on favorite memories can help us cope. One way to help the person's legacy live on is to establish a memorial gift in his or her honor.

Before you make a memorial gift, consider a few key factors:

- **Purpose:** Memorials honor the lives of friends or loved ones. You can make a gift to Banner Health Foundation or Banner Alzheimer's Foundation without restrictions, or the gift can support a particular hospital or area of care.
- Timing: Your gift may be given to us today to help support our most immediate needs, or you can include a gift in your will or living trust, stating that a specific asset, certain dollar amount or percentage of your estate will pass to us after your lifetime in honor of your loved one.



- **Type:** Cash is a popular and easy way to make a gift, but you can also use securities or other assets. Like all charitable donations, a memorial gift can offer tax benefits.
- Amount: No matter the size of your gift, you can be certain your support will make a lasting impact.

If our mission was important to a late loved one, please contact us to discuss ways that you can make a gift in honor of that special person. We'd be happy to work with you to create a gift that properly honors his or her memory.



Give in Their Name

Create a lasting tribute to someone special by making a gift in their name to Banner Health Foundation or Banner Alzheimer's Foundation. Learn the details in our new guide *Give From the Heart With a Tribute Gift.* Simply return the enclosed reply card to get started today!

Banner Health Foundation

Banner Alzheimer's Foundation

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2901 N. Central Ave., Suite 160 Phoenix, AZ 85012 602.747.GIVE (4483) www.bannerhealthfoundation.org

Dear Stella,

You know that feeling when you find the perfect gift for someone? It's nearly as good as receiving it.

Research has shown that there are benefits for both those who give and those who receive.

- It's good for your health. Giving has been linked to greater well-being.
- It's good for young people. Seeing role models give teaches them to think of others and their larger communities.
- It's contagious. Giving can cause a ripple effect.

Please enjoy this latest issue of *Health, Healing, Hope*. In it, you'll learn about the many ways a gift in your will or estate plan can benefit you and Banner Health and we offer valuable year-end giving tips and deadlines, too. We'll also tell you about Marty Tanona and the gift he made in honor of his beloved wife, Arlene.

Creating a lasting legacy—what you want others to remember you by—spreads gratitude in wider circles. It may also be just the encouragement others need to make a gift of their own.

If you have questions about anything in this newsletter, feel free to contact Ms. Pat Elder, Chief Development Officer for Planned Giving, at 602.747.4485 or patricia.elder@bannerhealth.com. She welcomes the opportunity to talk with you and to help you leave your legacy at Banner Health.

Sincerely,

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Ms. Andy Kramer Petersen President and Chief Executive Officer Banner Health Foundation and Banner Alzheimer's Foundation



Any gift you make to Banner Health Foundation or Banner Alzheimer's Foundation can be made in the name of a loved one. Learn how in our new guide *Give From the Heart With a Tribute Gift*. Simply return the enclosed reply card to get started today.



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Dear Stella,

How do you show someone your gratitude?

As a member of Banner Health Foundation's Legacy Society, you have shown us your gratitude for exceptional health care, ensuring that Banner Health will grow stronger and is equipped to improve the lives of others, today and into the future.

Thank you. We are deeply grateful for your commitment.

Did you know that research shows that giving has benefits as well?

- It's good for your health. Giving has been linked to greater well-being.
- It's good for young people. Seeing role models give teaches them to think of others and their larger communities.
- It's contagious. Giving can cause a ripple effect.

Your generosity may be just the encouragement others need to make a gift of their own. Hopefully, you also feel good.

In this enclosed issue of *Health, Healing, Hope*, we share insight into your best opportunities to achieve your charitable goals. We'll also tell you about Marty Tanona and the gift he made in honor of his beloved wife, Arlene.

Thank you again for inspiring us to provide the best health care for the community. Our gratitude for your gift is immeasurable, and your impact on those we serve is real and lasting.

If you have questions about anything in this newsletter or about your impact at Banner Health, please contact Ms. Pat Elder, Chief Development Officer for Planned Giving, at 602.747.4485 or patricia.elder@bannerhealth.com. She welcomes the opportunity to talk with you.

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Dear Stella,

How do you show someone your gratitude?

As a Banner Health volunteer, you have shown us your commitment to exceptional health care by giving your time and talent to improve the lives of others. We are deeply grateful for your investment in us. Thank you.

Did you know that research shows that giving has benefits as well?

- It's good for your health. Giving has been linked to greater well-being.
- It's good for young people. Seeing role models give teaches them to think of others and their larger communities.
- It's contagious. Giving can cause a ripple effect.

Hopefully, you also feel good about all you do to support our mission. Your commitment to Banner Health may be just the encouragement others need to give back, as well.

In this enclosed issue of *Health, Healing, Hope*, we share insight into your best opportunities to achieve some of your philanthropic goals. We'll also tell you about Marty Tanona and the gift he made in honor of his beloved wife, Arlene, and how you can do it, too.

Thank you again for helping us provide the best health care for the community. Our gratitude is immeasurable, and your impact on those we serve is real and lasting.

If you have questions about anything in this newsletter or about the ways you can extend your impact at Banner Health, please contact Ms. Pat Elder, Chief Development Officer for Planned Giving, at 602.747.4485 or patricia.elder@bannerhealth.com. She welcomes the opportunity to talk with you.

Gratefully,

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Ms. Andy Kramer Petersen President and Chief Executive Officer Banner Health Foundation and Banner Alzheimer's Foundation



Did you know that any gift you make to Banner Health Foundation or Banner Alzheimer's Foundation can be made in the name of a loved one? Learn how in our new guide *Give From the Heart With a Tribute Gift*. Simply return the enclosed reply card to get started today.

Honor a Loved One

Please complete and return this reply card in the enclosed envelope today. Thank you!

 Please send me the FREE guide Give From the Heart With a Tribute Gift.
 Please contact me! I'd like to discuss how my long-term plans can make an impact at Banner Health.
I have included Banner Health Foundation and/or Banner Alzheimer's Foundation in my estate plan but haven't yet notified you. My gift is in honor of:
Name Relationship
To opt out of future fundraising communications, please check this box and return this card with your name and address.
Thank you for supporting Banner Health!
Name (Please Print)
Address
City, State ZIP
Telephone
Email
We respect your privacy. Information collected here will not be

shared outside of our organization.

Make a Difference Today! See How Inside



Banner Health Foundation Banner Alzheimer's Foundation

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can create a lasting tribute that supports our work.

Why Choose a Planned Gift?

When you support our organization with a gift in your will or living trust, or through a beneficiary designation, you join a visionary group of donors who have discovered the benefits of this type of giving. These benefits include:

- Flexibility. You are free to alter your plans at any time.
- Versatility. You can structure your gift in different ways: a specific amount of money, piece of property or percentage of your estate (to ensure that your gift remains proportionate to your estate size).
- Safety. You retain control over your assets should you need them during your lifetime. Also, with a gift of your estate residuary (what remains after individual gifts, taxes, debts and final expenses are satisfied), you can be sure that your loved ones receive what you intend before our organization receives a gift.

Banner Health

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Getting Started

There are many ways you can remember a loved one. We would be happy to explore the options that can be most beneficial to you—and to discuss how your gift can preserve our organization's future. Please contact us today.

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Give From the Heart With a Tribute Gift



Tribute Giving

The Perfect Way to Honor Someone Special

When someone extraordinary touches our lives, we look for ways to express the depth of our love, admiration and gratitude. A charitable gift in his or her honor is a meaningful way to celebrate him or her.

If an inspiring person whom you have always wanted to honor—such as your mother, father, spouse, mentor or other loved one-values the work of our organization, consider making a gift in his or her name. When you make a gift in honor or memory of someone, you create a lasting tribute

to that individual as well as a legacy that supports our mission for years to come.

When you make a gift to our organization in honor of someone who has made a difference in your life you:

- Honor that special person.
- Support our mission.
- Possibly receive financial benefits.

There are many ways to make a gift in honor of someone special. Here are the five most common types of gifts.

No matter the size of your gift, you can be certain your support will make a lasting impact.

Current, Outright Gifts

1. Cash. The simplest way to make your gift is to write a check. By doing this you may be entitled to an income tax deduction.

2. Appreciated assets. If you make an outright gift of an appreciated asset that you've owned longer than one year, you may be entitled to an income tax deduction for the full fair market value of the asset, while eliminating the capital gains tax on the asset's appreciation.

Future Gifts

3. A gift in your will or trust in your loved

one's name. Your gift can be a specific amount, a percentage of your estate or the residue of your estate, which will pass to us after your lifetime. **4.**Beneficiary designations on a variety of assets. Retirement plan assets, life insurance policies, brokerage accounts, bank accounts and real estate (via a "transfer on death" deed) are simple and worry-free ways to make a gift. Because retirement plan assets may be taxed heavily after your lifetime, naming us as the beneficiary is a popular option.

Pat Elder, CPA, MBA Chief Development Officer for Planned Giving patricia.elder@bannerhealth.com 602.747.4485

Gifts That Live On Forever

5. Honorary endowments. With this powerful way to give, you make a gift now or through your estate plan. Endowments are structured so that a small portion of your gift, rather than the whole amount, is used each year to fund a particular purpose, with the balance invested for future growth. This helps ensure that the named fund will create a legacy in perpetuity. This also means that your loved one's name is forever associated with our organization's mission.



We're Here to Help

If you're looking for ideas on how to create the perfect gift, please give us a call. We'll be glad to help you find the best way to recognize your honoree.