



Creating a Legacy with Andwell Health Partners

A bequest—a gift made through your will—is one of the simplest and most meaningful ways to support **Andwell Health Partners**. Through a bequest, you can create a lasting legacy that reflects your values and commitment to compassionate care.

Your bequest may be a specific dollar amount, a particular asset, or a percentage of your estate. You may designate your gift for general use or direct it to a specific purpose that is meaningful to you.

Many individuals choose to establish an endowed fund to honor the memory of a loved one, a caregiver, or someone who made a difference in their life. Endowed funds are designed to exist in perpetuity, with only a portion of the fund distributed annually to support the designated purpose.

Types of Bequests

Specific Bequest

A gift of a specific dollar amount or particular asset (such as securities, real estate, or personal property).

Residuary Bequest

A gift of all or a portion of the remainder of your estate after payment of expenses and any specific amounts designated to other beneficiaries.

Including Andwell Health Partners in Your Will

The following sample language is offered to assist you and your attorney when considering a bequest to Andwell Health Partners.

Because every individual's circumstances are unique, we encourage you to consult with your legal advisor to ensure your wishes are properly documented and fulfilled. We also welcome the opportunity to speak with you confidentially about your intentions.

Since a will is an important legal document, you should seek the advice of an attorney. The following suggested wording may be helpful during that process.

Percentage of Estate for Unrestricted Purposes

"I give to Andwell Health Partners (Tax ID #01-0227184), a nonprofit organization, _____ percent (%) of the remainder of my estate to be used for its general charitable purposes."

Percentage of Estate to Establish an Endowed Fund

"I give to Andwell Health Partners (Tax ID #01-0227184), a nonprofit organization, _____ percent (%) of the remainder of my estate to establish the _____ Endowed Fund. The portion of this fund available for spending each year shall be used to _____. Additional contributions may be added to the Fund at any time.

"If changed circumstances at some future time make it impractical to continue administering the fund for the purpose designated, the Board of Directors of Andwell Health Partners may redesignate the purpose—provided the new purpose adheres as closely as possible to my original intent."

Specific Amount for Unrestricted Purposes

"I give to Andwell Health Partners (Tax ID #01-0227184), a nonprofit organization, the sum of \$_____ (or _____ shares of _____ stock) to be used for its general charitable purposes."

Specific Amount for a Designated Purpose

"I give, devise, and bequeath to Andwell Health Partners (Tax ID #01-0227184), a nonprofit organization, the sum of \$_____ in cash or in-kind (or _____ shares of _____ stock) to be used for _____.

"If changed circumstances at some future time make it impractical to continue administering the gift for the purpose designated, the Board of Directors of Andwell Health Partners may redesignate the purpose—provided the new purpose adheres as closely as possible to my original intent."

Designating the Purpose of Your Bequest

Unrestricted Gifts

Unrestricted bequests are especially valuable because they allow Andwell Health Partners to

respond to the community's greatest needs. They also provide flexibility should advances in medicine, changes in law, or evolving community priorities alter future funding needs.

Restricted Gifts

You may choose to direct your bequest to support a specific program, service line, or area of care that reflects your personal interests.

If your bequest is restricted, we recommend including the following language to ensure your gift can continue to serve a meaningful purpose should circumstances change:

"If changed circumstances at some future time make it impractical to continue administering the gift for the purpose designated, the Board of Directors of Andwell Health Partners may redesignate the purpose—provided the new purpose adheres as closely as possible to my original intent."