

Gifts from your Will or Trust

A simple way to leave a substantial gift

A bequest is the most common planned gift because of its simplicity, flexibility, and versatility. A bequest allows you to defer a gift until after your lifetime, retain the right to modify your decision should your circumstances change, and ensure your family is protected first. Naming the Winter Haven Hospital Foundation as a beneficiary in your will or revocable living trust may also provide valuable estate tax savings.

You can bequeath a specific asset, a certain dollar amount, or a percentage of your estate (most common) to the Winter Haven Hospital Foundation knowing that your thoughtful foresight will help further our mission in years to come. The flexibility of a bequest allows you to designate your deferred commitment as either spendable or endowed funds, for the Foundation's restricted or unrestricted use, or in honor or memory of a loved one.

If you already have a valid, up-to-date will or trust, you can direct your attorney to prepare an amendment – called a *codicil* – naming us as a beneficiary without having to rewrite your entire estate planning document(s).

For more information, please contact the Winter Haven Hospital Foundation by calling 863-291-6732 or email whhfoundation@baycare.org

Please note that the charitable giving information included on our website is provided for educational purposes only and is not intended to be legal, tax, investment, or insurance advice. The Winter Haven Hospital Foundation encourages you to always consult your professional advisors for all legal, tax, investment, and insurance advice unique to your personal situation and in consideration of your philanthropic, financial, and estate planning goals.