

Evergreen Legacy Giving Circle Enrollment Form

Name: _____

Spouse's Name: _____

Mailing Address: _____

Email: _____

Phone: _____

I have provided a gift to the Ascension Genesys Foundation in my estate planning as follows:

- ☐ Through an outright bequest in my will or living trust
- ☐ Through a conditional bequest in my will or living trust
- ☐ Through a beneficiary designation in my life insurance policy, annuity or financial account
- ☐ Through a beneficiary designation of my IRA or other retirement account
- ☐ Through a charitable remainder trust or other trust vehicle
- ☐ Other (please describe): _____

Documentation of intended gift is required for donor recognition. Foundation staff will work with you and your advisors on appropriate documentation. Documentation will remain strictly confidential.



What happens without a will?

Plenty, but it may not be what you had in mind, because you haven't made your wishes known. Without a written game plan for your assets and estate, the laws of the State that you live in will dictate what happens after you pass away, which may not be how you would have wanted it. A will or estate plan makes it clear where you want your assets to go.

Examples of language you can use in your will:

"I give the sum of \$_____ to the Ascension Genesys Foundation located in Grand Blanc, Michigan."

"I give all the rest, residue and remainder of my estate to the Ascension Genesys Foundation located in Grand Blanc, Michigan"

"I give, devise and bequeath _____% of my estate to the Ascension Genesys Foundation located in Grand Blanc, Michigan"

Ascension Genesys Foundation

One Genesys Parkway • Grand Blanc, MI 48439
810-606-6278 • genesyshealthfoundation.org

Federal Tax ID: 38-3591148

The Ascension Genesys Foundation is a 501(c)(3) non-profit organization.
Any gifts received are tax deductible to the extent allowable by law.

Evergreen Legacy Giving Circle



Ascension Genesys Foundation



The Ascension Genesys Foundation honors and recognizes persons of vision and foresight who have taken the initiative, through their estate plans, to strengthen and enhance the good works of Ascension Genesys through membership in the **Evergreen Legacy Giving Circle**

Through their generosity, Circle members make a difference far beyond the measure of a lifetime.

One of the greatest misconceptions is that philanthropy and generous giving is only for the wealthy. The Ascension Genesys Foundation provides many options to allow people of all ages, financial groups and interests to make an impact on patient care and community health through charitable giving.

As a member of the **Evergreen Legacy Giving Circle**, you are a part of one of the most prestigious groups of benefactors in the Ascension Genesys community. As such, your membership includes:

- Invitation to the annual Ascension Genesys Foundation gala
- Opportunities to meet Ascension Genesys leadership
- Invitation to special programs and events, including Circle-member-only events
- Acknowledgement of membership in Foundation publications and other displays of gratitude for Foundation donors

Membership Criteria

Membership in the **Evergreen Legacy Giving Circle** is open to any individual or couple who includes a planned gift in their estate plan in any of the following ways:

- A bequest in your will directing a percentage of your estate, a fixed amount, or a contingency statement which will direct an eventual gift to the Ascension Genesys Foundation
- Creating a trust or a life estate agreement that eventually directs a portion of the principal or earnings to the Ascension Genesys Foundation
- Establishing a Charitable Gift Annuity with the Ascension Genesys Foundation
- Naming the Ascension Genesys Foundation as the beneficiary of a life insurance policy, financial accounts or qualified retirement accounts.
- Gifts may be made as cash, real property/land, securities or personal property of significant value.

We strongly encourage you to consult with your financial advisor, tax professional or estate/family attorney for assistance in making a thoughtful, effective and impactful gift, and we are happy and eager to work with you and your advisors to ensure your gift has the impact you desire.



Areas of Support

Primary Service Lines

Cardiology/Genesys Heart Institute
Diabetes & Nutrition Education
Emergency Services
Capital Equipment Greatest Needs
Medical Education & Residency Programs
Mental/Behavioral Health
Neurosciences
Oncology
Orthopedics
Rehabilitation
Women & Children's Health

Mission Funds

Associate Hardship Assistance
Associate Scholarship Funds
Cancer Patient Support
Hospice - Patient and Family Support
Hospice - Children's Bereavement Services
Palliative Care
Patient Assistance
Sanctuary Garden Fund
Spiritual Care

Community Benefit Funds

Community Wellness Programs
Veterans Programs
Parkinson's Exercise Programs

Contact the Ascension Genesys Foundation for more information on areas of support and funding opportunities.