LEAVE YOUR LEGACY

AT ROPER ST. FRANCIS HEALTHCARE

ROPER ST. FRANCIS
FOUNDATION

YOUR LEGACY...

The Roper St. Francis Foundation works with our community to strengthen the Roper St. Francis Healthcare mission of healing all people with compassion, faith and excellence. Your gifts play a vital role in our ability to provide exceptional care to our patients and community.

Creating an estate plan that reflects your values and wishes is a critical step toward planning for yourself, your loved ones, and the causes you hold dear. We invite you to partner with us to ensure that Roper St. Francis Healthcare can continue advancing our mission.

If you are looking for a tax-efficient way to make a lasting impact on our patients and the Charleston community, we would like to share some information on our planned giving options through the Roper St. Francis Foundation.

...OUR FUTURE

The Roper St. Francis Foundation offers a range of options for leaving your legacy and building a more secure financial future for yourself based on various factors such as gift amount, age, and assets. Some of those options include:

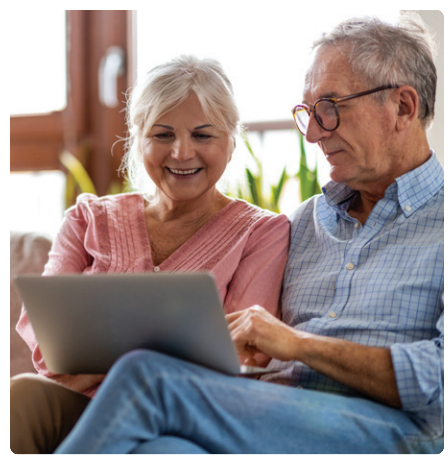
- ***Leaving a gift in your will or living trust.***
- ***Naming the Roper St. Francis Foundation as a beneficiary of your retirement plan or life insurance.***
- ***Giving appreciated stocks, bonds or mutual fund shares.***
- ***Income-producing gifts such as charitable gift annuities and trusts.***

Sound too good to be true? It's not. The advantages of planned giving for you and for Roper St. Francis Healthcare are real. That means you can show your support for our mission of healing all people and help us transform healthcare in the Lowcountry.

"Leaving a planned gift enables me to do something now that will have an impact for decades to come, giving me the reassurance that I will be leaving my legacy at Roper St. Francis Healthcare."

*– **Dick Clapp,** Member of The Legacy Circle*

AN INVITATION TO JOIN THE LEGACY CIRCLE



Become a member of the Legacy Circle by informing us that you have included the Roper St. Francis Foundation in your estate plans.

The Legacy Circle was established to recognize our generous and visionary friends who have included the Roper St. Francis Foundation as the beneficiary of a planned gift such as a bequest, appreciated securities, gifts of life insurance and/or charitable income gifts, such as charitable gift annuities, charitable remainder unitrusts, or charitable remainder annuity trusts.

Being a member of The Legacy Circle gives you the confidence that only comes with knowing you are investing in the future of Roper St. Francis and making a significant difference in the future health of the Lowcountry. In recognition of your planned gift, you will be included, with your permission, in Legacy Circle member listings.

Suggested language to use regarding your will, trust or beneficiary designation:

"I, [name], of [city, state, zip] give, devise and bequeath to Roper St. Francis Foundation (EIN: #57-1068509), the sum of $___[or x% of residual estate or property description] for its unrestricted use and purpose."

Not intended to provide legal advice.

DISCOVER HOW EVERYONE BENEFITS FROM PLANNED GIFTS

Your Goal	Your Gift	Your Method	Your Tax Benefit	Age Limit	Minimum Amount
Honor someone special with a tribute gift that costs you nothing during your lifetime	**Gift through your will or trust ("bequest")**	Includes a gift of cash, property or a share of your estate through your will or trust	Estate tax deduction	None	None
Make a gift while leaving more of your estate to your heirs	**Gift of Retirement Assets**	Name Roper St. Francis Foundation as a beneficiary of your retirement plan	Estate tax deduction	None	None
Make a gift while avoiding capital gains liability	**Gift of Appreciated Securities**	Transfer stocks, bonds or mutual fund shares to Roper St. Francis Foundation	• Income tax deduction in the year of your gift • Avoid capital gains tax on highly appreciated assets	None	None
Support the causes you care about over time while retaining the flexibility to recommend when and how your charitable gifts are distributed	**Donor-Advised Fund**	Contact Suzie Smith to help you decide if a donor-advised fund is right for you	• Income tax deduction in the year of your gift • Growth of investment is tax free	None	$5,000
Make an extraordinary gift at minimal cost to yourself	**Gifts of Life Insurance**	Donate a life insurance policy you no longer need or name Roper St. Francis Foundation as a beneficiary of an existing policy	Estate tax deduction	None	None
Make a future gift while creating a dependable income stream for yourself	**Charitable Gift Annuity**	Exchange cash or appreciated assets for fixed lifetime payments	• Income tax deduction • Fixed lifetime payments	Varies	None
	Charitable Remainder Trust	Transfer assets to a trust that provides lifetime income	• Income tax deduction • Potential capital gains tax savings	None	None
Support Roper St. Francis while reducing taxable income	**Qualified Charitable Distribution**	Make a gift directly from your IRA to the Roper St. Francis Foundation	• May satisfy all or part of your RMD • Excluded from taxable income	70½	None

INTERESTED IN BECOMING A LEGACY CIRCLE MEMBER?

Visit us at **rsfhfoundation.org/plannedgiving** to learn more.

We would love to discuss your plans with you and answer your questions. We are here to help every step of the way.

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ROPER ST. FRANCIS FOUNDATION

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