



CHARITABLE GIVING

*how to do more than
you ever imagined*

Learn how easy it is to have a
lasting impact on Mass General.



HOW TO MAKE A GIFT THAT HELPS YOU AND MASSACHUSETTS GENERAL HOSPITAL

- You could prevent or cure disease.
- You could improve care worldwide.
- You could educate the next generation of health care leaders.

You can name Mass General in a will or living trust

- **It's straightforward.** A simple change to your will or trust by your attorney is all that's needed to make a lasting gift to Mass General.
- **It's flexible.** You keep control of your assets and make a future gift while preserving what you need for your life. If life circumstances change, you can revise your will or trust.
- **It's personal.** Enhance a specific program with your gift, or leave it unrestricted for Mass General to use it for the greatest need.

Consider this Sample Bequest Language

I give (the sum of \$ _____ or _____ percentage of my estate) to The Massachusetts General Hospital, a Massachusetts not-for-profit, 501(c)(3) tax exempt corporation having a principal place of business on Fruit Street, Boston, Massachusetts, federal tax ID number 04-1564655.

Did you know you can make a gift to Mass General outside of your will or trust?

Giving this way is easy. You just need to sign a form that names Mass General as a beneficiary of your financial accounts, such as your IRA, other retirement plans and life insurance policies along with your checking and savings accounts, brokerage accounts and commercial annuities.

Accounts governed by beneficiary designations:

- do not pass through your will or trust.
- are flexible and revocable.
- can be contingent on caring for your loved ones.
- pass tax-free when transferred to Mass General.
- avoid the probate process.

COMMON QUESTIONS

Who can make this kind of gift?

Anyone can make a gift in their will, living trust or by beneficiary designation to support Mass General.

What can my gift support?

You decide how you would like us to use your gift. We will confidentially discuss your areas of interest and restrictions to ensure that Mass General can carry out your wishes. We draft language in cooperation with you, your family and advisors.

How do I name Mass General in my will or living trust?

A gift in your will or living trust is a future gift you can revise at any time during your lifetime. You can:

- give a specific dollar amount or percentage.
- leave specific assets — stocks, mutual funds, real estate or other property.
- leave the remainder of your estate to Mass General after distribution of your other gifts and paying your final taxes.
- make your gift contingent so that Mass General only receives a gift under specified circumstances, such as the passing of a spouse.

How do I make a gift of property controlled by beneficiary designation?

You can name Mass General as a partial or full beneficiary of your assets. You can leave as little or as much to Mass General, while continuing to take care of your loved ones. Typically, all you need to do is to contact your financial institution and ask for a beneficiary designation form. You can also download the appropriate forms from your financial institution's website. These accounts include:

- Retirement Plans - IRA, 401(k), 403(b), Keough
- Life Insurance Policies
- Bank or Brokerage Accounts
- Commercial Annuities
- Certificates of Deposit
- Donor Advised Funds

What if I have a plan, but want to make a change?

If your estate plan is current, you can make a change such as adding a charitable beneficiary. Your attorney can prepare an amendment to your will or living trust. Often, this can be done quickly.

NEXT STEPS?

We're here to help answer questions, refer you to estate planning resources, or draft sample language for you to share with your family and advisors.

If you include Mass General in your plans, please use our legal name and federal tax ID:

Legal Name: Massachusetts General Hospital
Address: 55 Fruit Street, Boston, MA 02114
Federal Tax ID Number: 04-1564655

Please let us know if you have included a gift to Mass General in your estate plans. We would like to thank you and ensure that we can fulfill your wishes. Contact our office at **(617) 643-2220** or mghdevpg@partners.org.

Mass General encourages donors to consult with their tax and legal advisors when considering these gifts.