



Sample Gift Language for Wills or Revocable Living Trust

A gift to the Foundation at Carson Tahoe Health in your will or revocable trust enables you to support our mission to enhance the health and well-being of the communities we serve. It also enables you to make a difference in the lives of future generations. A bequest is easy to arrange. It will not alter your current lifestyle in any way, and it can be easily modified to address your changing needs.

When creating your will or trust, please refer to our organization as:

Carson Tahoe Health
Foundation
1600 Medical Parkway
Carson City, Nevada 89703

Tax ID: 88-0502320

There are several different ways to include Carson Tahoe Health as a beneficiary of your will or trust. Here are some examples of suggested language. Please feel free to adapt this language with your attorney to fit your individual situation.

SPECIFIC GIFT LANGUAGE

Naming Carson Tahoe Health (Carson Tahoe Regional Healthcare) as a beneficiary of a specific amount or percentage of your estate is easy:

I give and devise to Carson Tahoe Regional Healthcare, located in Carson City, Nevada, the sum of \$_____ (%) to be used for its general support (or for the support of a specific fund or initiative).

RESIDUAL GIFT LANGUAGE

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Carson Tahoe Regional Healthcare, located in Carson City, Nevada, all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or initiative).

CONTINGENT GIFT LANGUAGE

Carson Tahoe Health can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Carson Tahoe Regional Healthcare, located in Carson City, Nevada, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or initiative).

RETIREMENT PLAN BENEFICIARY LANGUAGE

You may name Carson Tahoe Regional Healthcare (Carson Tahoe Health) as a beneficiary of your IRA or other qualified retirement benefits. Donors should consult with their tax advisor regarding the tax benefits of such gifts.

Naming Carson Tahoe Regional Healthcare (Carson Tahoe Health) as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan will accomplish a charitable goal while realizing significant tax savings. It can be costly to pass such assets on to heirs because of heavy tax consequences. By naming the not-for-profit health system as a beneficiary of a retirement plan, the donor maintains complete control over the asset while living, but at the donor's death the plan passes to support the health of our community free of both estate and income taxes.

Making a charitable gift from your retirement plan is easy and should not cost you any attorney fees. Simply request a change-of-beneficiary form from your plan administrator. Then, enter Carson Tahoe Regional Healthcare (Tax ID# 88-0502320) on the form with the percent you would like us to receive. When you have finished, please return the form to your plan administrator and notify our Center for Philanthropy team at Carson Tahoe Health. We can also assist you with the proper language for your beneficiary designation to us.

CONTACT US

Please call us to discuss your plans.

We would love to help you create a legacy plan that suits your circumstances, aligns with your giving goals, and provides better health opportunities to our community for generations to come.

If you have questions or would like to schedule a call, please reach out to Melissa Elges, our Director of Foundation, at 775-445-8416.