



Leave your Legacy
for the future of health care

The Power of Planned Giving



Since 1955, Valley View has been unwavering in its commitment to the health of our community. Today, Valley View serves as the largest and most advanced network of care in the region. Valley View remains committed to serving our patients and our thriving community by ensuring we remain local, independent and not-for-profit.

Donors can have a significant impact on the future of health care in our region with a legacy gift to Valley View.

Making a Planned Gift through a will or estate will strengthen local, independent health care, ensuring access to the highest quality care, close to home, for generations to come. Various types of planned gifts can offer tax and income benefits, while creating a meaningful family legacy in our community.

There are numerous avenues to include Valley View in one's estate plan. Planned giving will not impact a donor's current financial situation, but will have enormous positive impact on our community's health care in the future.



Make a Bequest - Gifts by Will or Trust

In order to make a bequest, a donor simply allocates a portion of their estate to Valley View Foundation in their legal will or trust. Gifts can be named as a specific dollar value, a percentage of the donor's total estate, or the remaining assets of an estate after all bequests to family and loved ones have been fulfilled. Bequests come in all amounts, and may help a donor save on estate and other taxes.

Life Insurance or Individual Retirement Accounts

Donors can name Valley View Foundation as a full or partial beneficiary of life insurance policies or unused retirement or annuity accounts. These can include IRAs, 401 (k) or 403 (b) accounts or pensions. By naming a charitable beneficiary, funds will transfer to Valley View Foundation without probate.

Charitable Gift Annuities

A charitable gift annuity offers both immediate financial benefits to the donor, and long-term philanthropic impact. Valley View Foundation partners with the National Gift Annuity Foundation, the country's largest independent charitable gift annuity pool. This partnership enables our donors to receive a tax deduction and lifetime income, with funds transferring to Valley View at the end of life. Visit www.nationalgiftannuity.org additional details.

Advanced Planning Techniques

Advanced planning tools include Charitable Remainder Trusts and Charitable Lead Trusts. These giving instruments can offer significant tax benefits to donors, and in some cases, generate income during a donor's lifetime.

Consider a gift to a Valley View Endowment

Donors may choose to endow a planned gift. An endowment gift can assist Valley View patients in perpetuity—creating a lasting legacy that will benefit future generations and ensure Valley View meets our community's health care needs for decades to come.



Valley View Hospital has been in our lives for over 25 years. We have been patients, an employee, volunteers, a foundation board member, donors and more. The Roaring Fork Valley and beyond is fortunate to have high quality health care so close to home. Supporting local medical care with a planned gift will ensure a thriving future for our community. Valley View has excellent physicians and staff, provides many specialty areas of care, and employs over 1500 people who have chosen the Roaring Fork Valley as their home. We will continue our support of Valley View!

- Ken and Patti Miely

In addition to Legacy giving, Valley View accepts several non-cash assets, which allow donors to have significant philanthropic impact.

Qualified Charitable Distributions (QCD)

Donors over age 70 ½, may consider a tax-free charitable rollover gift from an IRA. These rollover gifts may be excluded from taxable gross income, and count toward the minimum required distribution. Please contact Valley View Foundation to make a QCD, as there are specific instructions to follow in order to make these gifts.

Gifts of Stocks, Securities or Real Estate:

Valley View Foundation accepts gifts of stock, securities or other appreciated assets. These types of gifts may have income tax benefits, allowing donors to avoid taxable gains, while making a substantial philanthropic impact.



Valley View Hospital supported our family in times of medical need. We realized how lucky our community is to have such amazing care available so close to home. This is possible because of generous local philanthropy. Including Valley View in our legacy plans allowed us to commit to a gift much larger than we would otherwise be able to provide to benefit our community for generations to come.

-Jamin Heady-Smith & Caitlin Carey

**Learn more about including a gift to
Valley View Foundation in your estate plan.
Contact 970.384.6620 or foundation@vvh.org.**

This material is for informational purposes only and does not constitute tax, legal, or accounting advice. Valley View Foundation, its employees, and representatives do not provide such advisory services but will gladly work with your advisors. Individuals considering a planned gift should consult with their professional tax and legal advisors to determine the most suitable structure for their contribution.