

Ohio's Hospice of Dayton was created in 1978 by members of the community. For nearly 40 years, Ohio's Hospice of Dayton has served the needs of the community by providing the very best end-of-life care, support and comfort for any patient or family that needs our services.

Below is a checklist of items that should be kept in one place. A trusted loved one or the executor of your estate would need access to these documents.

- Key to your property
- Computer user ID and passwords
- Durable Health Care POA
- Living Will
- Power of Attorney (POA)
- Most current estate planning documents/will
- Trust documents
- Bank information
- Safety deposit boxes
- Driver license copy
- Health insurance and/or Medicare cards
- Marriage and/or divorce papers
- Military documents
- Land deeds
- Vehicle titles
- Stock and bond certificates
- Business agreements
- Outstanding loan information and/or other debt
- Tax returns
- Insurance policies
- Retirement accounts
- Annuity accounts



OHIO'S
Hospice™
OF DAYTON 

PLANNED GIVING





Planned giving is an option for donors at all income levels. Through a planned gift, you can support the future needs of patient care and grief support.

Interested? With planned giving, you have various options. Here are a few vehicles that may be of interest to you.

BEQUEST

A bequest is a gift made during your lifetime through your will or a living trust. If you already have one, your attorney can amend your current plans with a one-page document. You can choose to leave a specific amount or a percentage of your estate to Ohio's Hospice of Dayton.

BENEFICIARY DESIGNATION

Beneficiary designations may be made on retirement plans, insurance policies, bank accounts and stocks/bonds. You may appoint Ohio's Hospice of Dayton as a beneficiary for the full face value or a percentage of the value of your accounts. It is simple; just ask your account representative for the appropriate forms.

CHARITABLE GIFT ANNUITY (CGA)

If the idea of a fixed income for life is appealing to you, your financial advisor may suggest a CGA. You will immediately receive a tax deduction plus a set income for your lifetime, and Ohio's Hospice of Dayton will receive the balance at the end of its term. It is literally the gift that keeps on giving!

CHARITABLE REMAINDER TRUST

Another gift that keeps on giving is a charitable remainder trust. You transfer your assets to a trust that pays a fixed or variable rate to you or another designee. Payments can be for your life or a designated amount of years (up to 20).

When the terms of the trust expire, the remaining assets assigned to the trust go to Ohio's Hospice of Dayton.

CHARITABLE LEAD TRUST

A charitable lead trust is the reverse of a Charitable Remainder Trust. The trust pays the fixed or variable rate to Ohio's Hospice of Dayton for a set number of years. When the terms of the trust expire, the assets are designated back to you or another designee.

These are a few ways you can choose to carry on your legacy beyond your lifetime. If you choose to leave a gift of love while providing support to Ohio's Hospice of Dayton, please contact your financial advisor and/or your attorney. Then contact Ohio's Hospice of Dayton. We would like to recognize you and include you as part of our "Legacy Circle." Your name will be permanently imprinted on our Legacy Wall at Ohio's Hospice of Dayton.



If you would like to learn more about planned giving, please contact Lori Poelking-Igel at 937.723.2891.

YES! I would like to learn more about planned giving at Ohio's Hospice of Dayton.

Please send additional information about:
Please send additional information about:

- Bequest
- Beneficiary Designation
- Charitable Gift Annuity (CGA)
- Charitable Remainder Trust
- Charitable Lead Trust

Name _____

Address _____

City _____

State _____ Zip _____

Phone (____) _____

Email _____

Please detach and mail to:

Hospice of Dayton Foundation
324 Wilmington Ave.
Dayton, OH 45420