

BENEFICIARY DESIGNATION GIFTS

A beneficiary designation gift is a simple and affordable way to make a gift to support Rutland Regional Medical Center. You can designate Rutland Regional Medical Center as a beneficiary of a retirement, investment or bank account or your life insurance policy.

- **Benefits of a Beneficiary Designation Gift**

- Support Rutland Regional Medical Center
- Continue to use your account as long as you need to
- Simplify your planning and avoid expensive legal fees
- Reduce the burden of taxes on your family
- Receive an estate tax charitable deduction

- **How a Beneficiary Designation Gift Works**

1. To make your gift, contact the person who helps you with your investment account, retirement plan, or insurance policy, such as your broker, banker, employer or insurance agent.
2. Ask them to send you a new beneficiary designation form.
3. Complete the form, indicate that the beneficiary or one of the beneficiaries is Rutland Regional Medical Center, sign it and mail it back to your broker, banker or agent.
4. When you pass away, our account or insurance policy will be paid or transferred to Rutland Regional Medical Center consistent with the beneficiary designation.

- **Important Considerations for Your Future**

If you are interested in making a gift but are also concerned about your future needs, keep in mind that beneficiary designation gifts are among the most flexible of all charitable gifts. Even after you complete the beneficiary designation form, you can take distributions or withdrawals from your retirement, investment or bank account and continue to freely use your account. You can also change your mind at any time in the future for any reason.

Please note: The Rutland Regional Medical Center is a non-profit hospital recognized as tax exempt under Section 501(c)(3) of the Internal Revenue Code and does not provide tax, legal, or financial advice. Any document or information shared by our staff is intended to be educational. We strongly encourage donors to seek counsel from their own legal and financial advisors. Please be aware that any information or documents shared by our staff cannot be used to avoid tax-related penalties.