

# Leaving Your Legacy

Your Charitable and Gift Planning Guide • Fall 2020

## Passionate Support Provides a Safety Net for Cancer Patients

*HOPE Fund Endowment Donors Prepared for a Crisis*

Last year, Dr. Jamie and Laura Smith made the personal decision to support the HOPE (Helping Oncology Patients Everyday) Fund Endowment.

The HOPE Fund Endowment was established in 2017 to prepare for a crisis that may interrupt charitable giving to the HOPE Fund. The proceeds from the Endowment could be used to fund critical services for cancer patients undergoing treatment.

Little did they know that our country's most significant healthcare crisis was looming: COVID-19.

Dr. Smith, a medical oncologist with McLeod Oncology and Hematology Associates, and his partners were acutely aware of the vulnerability of their cancer patients. As McLeod Health responded to the emergency, protocols were put in place to provide protection for patients with compromised immune systems as they continue their treatment.

The HOPE Fund, which had been a lifeline for so many, now became even more essential as patients and their family members lost their jobs. Increasing numbers of patients faced financial obstacles and needed help with transportation, medications and nutrition.



*Dr. and Mrs. Jamie Smith*

While donors to the HOPE Fund made these vital services available, the Endowment was in place if this crucial funding was threatened.

Laura shares that their family and close friends have faced a cancer diagnosis. **She feels passionately that patients should be able to focus on getting healthy and not have to worry about financial struggles or other barriers to care.**

Dr. Smith chose to establish his practice at McLeod Health because it offers the resources to provide the level of care he knows is best for his patients. They are generous supporters of the McLeod Foundation and advocates for the compassionate focus on patients at McLeod.

The Smiths appreciate knowing that their gifts ensure the HOPE Fund Endowment will always be a safety net for patients struggling with a cancer diagnosis.

# Your Support of the HOPE Fund Saves Lives

*A Personal Story by a Grateful Cancer Patient*

For Ethel Ivey, a two-time cancer survivor, the HOPE Fund literally saved her life.

In May 2018, Ethel was diagnosed with Stage 3 colon cancer and was referred to Dr. Jamie Smith. Ethel lives in Dillon and had to travel to the McLeod Center for Cancer and Treatment and Research in Florence for eight rounds of chemotherapy. While a scan in November showed success, a follow-up scan in April 2019 indicated that the cancer had spread to her liver. Now, she faced 12 additional rounds of chemotherapy.

She and her husband do not own a car and must depend on a few family members to drive her to Florence. This was a difficult commitment as the treatments lasted all day. They eventually were not able to continue helping.

Dr. Smith, who knew Ethel was dedicated to getting well, noticed when she kept missing appointments at the McLeod Cancer Clinic, which is the only clinic in the state that provides services for patients with no insurance coverage. He expressed his concerns to Tara Pierce, McLeod Cancer Clinic Coordinator.

Tara contacted Ethel and learned that she had run out of options for travel to her lifesaving treatments.

Ethel was overwhelmed with relief when Tara explained that the HOPE Fund was available to help her. She is incredibly grateful that generous people make gifts to the HOPE Fund so she can continue her journey to survival.



*Dr. Jamie Smith, Ethel Ivey and Tara Pierce*

*Ethel continues her journey to health with a maintenance medication and regular visits to see Dr. Smith in the Cancer Clinic because of the generosity of HOPE Fund supporters like you.*

Ethel celebrated with her caring nurses when she rang the bell following her last chemotherapy treatment. She shares, “Dr. Smith, Tara and the entire team have been awesome. I will forever appreciate those who have given to the HOPE Fund. Thank you.”

## *A Lasting Impact*

Your gifts make a difference for patients like Ethel. Learn more about ways you can help us save lives by contacting Elizabeth Jones, Development Officer, at (843) 777-2694 or [elizabeth.jones@mcleodhealth.org](mailto:elizabeth.jones@mcleodhealth.org).

# A (Literal) Lasting Legacy

*How an Endowment Secures Your Values Forever*



Think of an endowment as a verb -- it's what you do with your gift rather than the gift itself. A true endowment is permanently invested, supporting programs you are passionate about not just for one year or even one generation, but forever.

How does it work? The McLeod Health Foundation spends just a portion of the endowment annually, allowing the overall fund to grow.

Endowments provide numerous benefits to you, as well as to those we serve. Here are five ways endowments create a lasting legacy.



*Contact Elizabeth Jones, Development Officer, at (843) 777-2694 or [elizabeth.jones@mcleodhealth.org](mailto:elizabeth.jones@mcleodhealth.org) to discuss your endowment goals. We would be happy to talk to you at no obligation.*

*1. They are a permanent representation of your values.*

An endowed gift ensures the continuation of programs (like the HOPE Fund) that are important to you. By creating or adding to a permanent endowment, you enable us to carry out your wishes, so long as it is practical and possible to do so.

*2. They allow you to perpetuate annual gifts.*

You can use an endowment to extend your yearly giving forever. For example, if you regularly give \$1,000 annually, you can establish a \$25,000 endowment in order to continue yearly support of at least \$1,000 to the Foundation for generations to come.\*

*\*Assumes a 4% endowment spending level.*

*3. Contributions to them offer tax savings.*

If you create an endowed gift through an immediate donation, you qualify for a federal income tax charitable deduction when you itemize your taxes.

*4. You can create them through your estate plan.*

Gifts in your will or given through a legacy gift, such as designating us as the beneficiary of your life insurance or including us in your will, can fund an endowment.

*5. They foster our stability.*

Thanks to your incredible foresight, the McLeod Foundation can draw upon endowments each year to meet a portion of McLeod Health's patient needs. This diversified, reliable funding helps us plan thoughtfully and responsibly for the future.

# Mission: Possible

*Thanks to Your Support*

There are many reasons to make a charitable gift to the McLeod Health Foundation -- and your passion for making a difference for our patients is likely at the top of that list. Friends like you make it possible for us to provide quality care to our communities, in a variety of ways, today and for years to come. No matter where you're at in life, there are ways for you to support McLeod Health that can also serve you well.

## *Give Tomorrow*

At the McLeod Foundation, planned giving ensures we can sustain our mission for generations. When we know about your future gift, we can plan for that revenue and all the good it can do.

*Future gifts include:* gifts in your will or living trust; beneficiaries of your retirement plan, bank or brokerage account, or life insurance policy

Deferred gifts allow you to make a bigger impact than you initially thought possible, perhaps more than your current budget allows. Maintain control of your assets, with the flexibility to extend your support beyond your lifetime.

## *Give Today*

McLeod Health has pressing needs to meet every day. When you give an outright gift, you make our current work possible.

*Current gifts include:* cash or check; appreciated assets, such as securities or real estate; tangible personal property; grants from your donor advised fund; gifts from your IRA

With these gifts, you put your estate to good use now. Connect with causes and organizations you care about, and see the very real difference your generosity makes.

## *The Possibilities Are Endless*

If you are passionate about our mission, let's talk. There are many ways to share your support that can meet your needs and ours. Contact Elizabeth Jones to start the conversation.

**McLeod Health**  
Foundation

P.O. Box 100551  
Florence, SC 29502-0551  
(843) 777-2694 • Fax: (843) 777-5174

Elizabeth Jones • Development Officer  
elizabeth.jones@mcleodhealth.org  
[www.mcleodfoundation.org](http://www.mcleodfoundation.org)