

Leaving Your Legacy

Your Charitable and Gift Planning Guide • Fall 2025



Marvin and Beth Ann Owen and their family lit the trees in memory of Helen Thomas Owen at the 38th Annual McLeod Hospice Tree Lighting Ceremony.

Service, Generosity and a Commitment for the Future

Beth Ann and Marvin Owen Leave a Legacy of Caring

Family, healthcare and the power of philanthropy have guided Beth Ann and Marvin Owen in their establishing of a legacy commitment to the McLeod Health Foundation.

For Beth Ann and Marvin, generosity and service go hand in hand. **This dedicated couple shares their wisdom, leadership and generosity in support of a variety of programs and services funded by the Foundation.**

Marvin literally grew up around McLeod as his father, the late Dr. James Owen, was a much-loved OB-GYN. His plans were to pursue his father's career path until he observed his first

cesarean section. Fortunately, he quickly changed his major to computer science, helping to found ACS Technologies in the late 1970s.

Beth Ann recalls her first memory of McLeod when she witnessed the excitement of her father-in-law on the day the hospital moved from the original infirmary location to McLeod Regional Medical Center in 1979.

Experiences with their own children and Beth Ann's career as a pediatric nurse also led to close connections with the McLeod Children's Hospital. Marvin and ACS have been longtime sponsors of the Children's Hospital Golf Classic,

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and Marvin currently serves as the Chair of the Golf Committee. He also previously served on the McLeod Foundation Board of Trustees.

In 1996, Beth Ann's family experienced hospice care with her father, John Kenney, in Charlotte. In 2015, her mother, Ann Kenney, also received hospice care while under the care of a nursing home facility. Following these experiences, Beth Ann and Marvin became McLeod Hospice Tree Lighting Sponsors to support the program that helped so many like her parents.

"As a nurse by profession I knew what hospice was," says Beth Ann. "But I did not become closely involved with hospice until my father was diagnosed with pancreatic cancer."

Beth Ann's parents were fortunate to have insurance and the financial means to cover unforeseen needs during their illnesses, but many other patients are in difficult situations and see those unanticipated needs go unmet. Honoring and remembering this care, Beth Ann volunteers her time with the McLeod Hospice program. She currently serves as the Chair of the Butterfly Fund Advisory Committee.

In 2022, Marvin's beloved mother, Helen Owen, was cared for by McLeod Hospice at the time of her passing.

"My parents' story was a Florence story, a McLeod story and, like any good story, it's a love story," explains Marvin.

Helen and her husband, James, first met while working in the McLeod Emergency Department. She was a nursing student, but once they married, she settled into taking care of the family so her husband could focus on his work as one of Florence's first OB-GYNs.

"After a stroke, she had a brief visit to the hospital but spent her last days at the McLeod Hospice House, which was so wonderful," Marvin shares about his mother. "Everybody here knows the value of McLeod Hospice, and that is why we support it."

The Owens strongly believe in giving back to their community and it was because of these family experiences that Beth Ann and Marvin decided to establish a McLeod Hospice Tree Lighting Endowment.

"We understand the power of an endowment," offers Beth Ann. "We will honor and remember our beloved parents while helping other families each year for generations to come. Our family feels good about that."

Like Beth Ann and Marvin, you can use your estate plan to help provide high-quality, compassionate care for future generations. Contact Elizabeth Jones at (843) 777-2694 or elizabeth.jones@mcleodhealth.org to learn about the many ways you can create your caring legacy at McLeod Health.



What is YOUR Philanthropic Vision?

When you find something you love — whether it's a community of people, a special place or an important cause — you naturally want to nurture and protect it so that it lasts.

It is our honor and privilege to partner with generous members of our McLeod Health community, like you. With your support, we are improving the overall health and well-being of people living within South Carolina and eastern North Carolina by providing excellence in healthcare.

Here at the McLeod Health Foundation, we strive to get to know incredible donors like you. We are inspired by your passion for those we serve, and it's important to us that we understand the difference you would like to make through your generosity. **It is our goal to help you determine the best way to achieve your philanthropic vision.**

Whether you want to make an immediate impact, create a legacy gift for after your lifetime or find a way to do both, *we would love to partner with you* to discover a plan that works best. Contact Elizabeth Jones to get started.

Despite Uncertainty, Keep Calm and Carry On Your Legacy

We know your commitment to McLeod Health remains steadfast. But we also respect that in a roller-coaster economy, you want to make sure your financial future stays strong.

The good news? You have several gift options that can make an impact at McLeod Health while still allowing you to protect yourself and your loved ones.

Gifts That Require No Money Today

A gift in a will or trust: It takes as little as one sentence in your will or living trust to support us after your lifetime.

Beneficiary designations: Name the McLeod Health Foundation as a percentage beneficiary of a retirement account or life insurance policy.

Gifts That May Offer Tax Benefits

Donor advised fund (DAF): Add funds to an existing DAF or open a new one to qualify for a tax deduction. Ready to make an impact? Recommend a grant (or recurring grants) to support McLeod Health.

A gift from your IRA: If you are 70½ or older, you can give from your IRA directly to the McLeod Health Foundation without paying income taxes. If you are required to take minimum distributions, you can use your gift to satisfy all or part of your obligation.

Appreciated stock: If you have held stock for at least one year that has risen in value, you could donate it, qualify for an income tax deduction and eliminate any tax on the appreciation.

A Gift That Pays You

Charitable gift annuity: You make a gift to us and receive fixed, reliable income for life in return, regardless of what happens in the markets.



We're Happy to Help

Please contact Elizabeth Jones at the information below or scan the QR code to begin the discussion on building your legacy at McLeod Health. We look forward to walking through the many smart options available to you.

McLeod Health Foundation

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