

Baptist Health Foundation
**Gloria Vasta Lewis
Memorial Legacy Challenge**



Baptist Health Foundation

BAPTIST HEALTH SOUTH FLORIDA

Thank you for your interest in the Legacy Challenge!

Here are a few things to know



What is the Legacy Challenge?

Legacy giving has been—and will continue to be—an important part of planning for the Baptist Health of tomorrow. The Legacy Challenge uses matching dollars to move our mission forward today while securing future investments via estate gifts to support the organization's future.

What is the purpose of the Legacy Challenge?

Your philanthropic investment is vital today to supporting Baptist Health in its ambitious goal of transforming healthcare in the South Florida region and beyond by revolutionizing patient care, creating a global center for innovation, embarking on a new era of research and developing a hub for luminary minds.

How does the Legacy Challenge work?

During the Legacy Challenge, when you document your future estate gift to benefit Baptist Health, 10 percent of your future estate investment (up to \$100,000) is matched right now. This current matching gift will benefit Baptist Health today, while your future estate commitment establishes your legacy at the organization in the years to come.

Who can participate?

Any donor 60 or over who commits to a new or increased planned gift or converts a prior known revocable gift to an irrevocable gift. You must complete the Legacy Challenge form to participate.

Where do the matching dollars come from?

Gloria Vasta Lewis, a longtime Baptist Health supporter and Legacy Society Member, left a gift from her estate and made the Legacy Challenge possible by providing up to \$1 million in matching gifts. Ms. Lewis, who passed in January 2023 at age 92, made an impact on many of Baptist Health's



Gloria Vasta Lewis

patients and caregivers throughout her lifetime, and her kindness will be deeply missed. The matching gifts provided by the Gloria Vasta Lewis Memorial Legacy Challenge will leverage Ms. Lewis's generosity, generating funding to ensure Baptist Health's future while supporting its current critical initiatives.

How do I document my future estate gift for the Legacy Challenge?

It's simple — you can return the Legacy Challenge form or provide a copy of your will, trust, or other legal document. You can also contact Kevin Hughes, Director of Gift Planning at Baptist Health Foundation at GiftPlanning@BaptistHealth.net or call 786-467-5429 to request additional information.



How long will the Legacy Challenge last?

The Legacy Challenge will run through June 30, 2024, or until the matching funds are exhausted.

Is there an age requirement?

Yes, you must be 60 or older to participate.

What gifts qualify for the Legacy Challenge?

Generally, the following types of future estate gifts will be eligible for matching dollars:

- Bequest gifts in wills/trusts
- Beneficiary designations on insurance policies and retirement plans
- Pay on Death designations on bank or brokerage accounts
- Donor Advised Fund (DAF) commitment
- Charitable Gift Annuity (CGA)
- Charitable Remainder Trust (CRT)
- Charitable Lead Trust (CLT)



Bequest donors may convert their revocable gift to an irrevocable commitment by executing a simple gift agreement. By making their gift irrevocable, you could also receive campaign recognition, possible naming opportunities and membership in Baptist Health Foundation's Giving Society. Gifts of CGAs and certain charitable trusts are irrevocable by definition.

Revocable gifts will be accepted for the Legacy Challenge, and donors will receive recognition in the Living Legacy Society Legacy Challenge.

If I have already documented a future estate gift to Baptist Health, will it qualify for the Legacy Challenge?

We are grateful for all those who have included us in their estate plans. The Legacy Challenge is designed to inspire new philanthropic investments and fuel the future of Baptist Health. If you have never notified us of your gift, it will count in the Legacy Challenge, but due to limited matching dollars and the desire to promote new estate investments, the matching dollars will only be available when a new gift is documented, the value of a previously documented estate gift is increased or your known revocable gift is converted to an irrevocable gift.

Must I document an amount of my future estate gift for the Legacy Challenge?

If you confirm your estate gift, but choose not to share the dollar amount, a nominal gift from the challenge match pool (\$1,000) will be made in your name. You must complete the Legacy Challenge Form and check the box for “no dollar amount given.”

What areas can I direct my matching funds to support?

You may choose the Baptist Health entity or program you wish the matching funds to benefit, making your gift meaningful to you and your family.

What if the value of my future estate gift exceeds \$1,000,000? Do I qualify for more than \$100,000 matching funds?

We greatly appreciate your immense generosity. While your transformative investment will have an incredible impact on the future of Baptist Health, the maximum matching funds available for a single gift is \$100,000. This allows the remaining matching funds to inspire others to leave their legacy at Baptist Health as well.

Are there recognition benefits for donors?

Donors who make irrevocable commitments to the Legacy Challenge are eligible for membership in the Foundation’s Living Legacy Society. Depending on gift level, you may also qualify for membership in the Foundation’s Giving Society, which includes recognition opportunities and other courtesies. For details, consult your gift officer or Kevin Hughes, Director of Gift Planning, at GiftPlanning@BaptistHealth.net or 786-467-5429.

Revocable gifts will also be accepted in the Legacy Challenge. Revocable gift donors will receive special recognition in the Living Legacy Society as part of the Legacy Challenge.

What other ways can I support Baptist Health?

There are many ways to contribute to our mission, from volunteering to philanthropic giving to corporate sponsorships. If you are interested in learning more, please reach out to your gift officer or contact Baptist Health Foundation at 786-467-5400.

