

# Gloria Vasta Lewis Memorial Legacy Challenge



## Pledge Notification Form

**I have included a gift in my estate plans to Baptist Health Foundation. My gift is:**

- A bequest in my will or living trust
- A beneficiary designation in my retirement plan, donor advised fund, life insurance policy or other financial account
- A beneficiary designation in a Charitable Remainder Trust (CRT)
- A Charitable Gift Annuity (CGA)

**Gift details:**

- A new or previously undisclosed gift
- An additional gift or amount added to my prior gift
- I have already disclosed a revocable gift but would like to make it irrevocable
- To receive Campaign and Giving Society recognition, I hereby make my gift irrevocable  
Initial Here \_\_\_\_\_

**I will share the following details about my gift to trigger the maximum matching funds available:**

- My good faith estimate of the value of my gift in today's dollars is: \$ \_\_\_\_\_
- I'm not sure how to estimate the value of my gift; please contact me to assist

**I have attached the pertinent provision of my will, trust, or beneficiary designation form**

**I would consider including a gift to Baptist Health, but I need to do the following:**

- Discuss options with my family and/or consult with my attorney or other advisors
- Find or consult an attorney or other advisor to start or update my plans
- Other: \_\_\_\_\_
- Please follow up with me in \_\_\_\_\_ months

**I would like to discuss ways in which I can make a gift to Baptist Health Foundation in my estate plans. Please contact me:**

By phone: \_\_\_\_\_ By email: \_\_\_\_\_

**When recognizing my gift, my listing should appear as:** \_\_\_\_\_

- In memory of: \_\_\_\_\_

**I wish to remain anonymous**

Signature \_\_\_\_\_ Print Name \_\_\_\_\_

**Please return this form to:** Kevin Hughes, Director of Gift Planning

6855 Red Road, Coral Gables, FL 33143 | 786-467-5429

GiftPlanning@BaptistHealth.net | BaptistHealth.GiftLegacy.com



**Baptist Health  
Foundation**

**BAPTIST HEALTH SOUTH FLORIDA**

We respect your privacy. Information collected here will be kept strictly confidential. It will not be sold, rented, or otherwise disclosed.

# The Living Legacy Society



Each member of the Living Legacy Society has made a lasting commitment to the health of our communities by including Baptist Health South Florida Foundation in their estate plans. The Living Legacy Society was created to honor these individuals and their legacies.

Supporters are invited to join the Living Legacy Society if they have established any of the following gifts for the future:

- A gift of any amount to Baptist Health through a bequest in a will or living trust, including a contingent designation
- A 401(k), IRA, SEP, or similar retirement plan beneficiary designation
- A life insurance policy beneficiary designation
- A bank account, brokerage account, or other financial account beneficiary designation
- Naming Baptist Health Foundation as the beneficiary of funds remaining in a donor advised fund
- Including Baptist Health Foundation as a beneficiary of a charitable remainder trust
- Establishing a new charitable gift annuity

## Recognition and Events

Members of the Living Legacy Society are recognized on special installations at each Baptist Health entity, and are updated annually.

Members will also receive invitations to special events and have access to 'Grand Round' presentations by some of Baptist Health's leading physicians and researchers.

## We Are Here to Help

If you would like to explore your charitable gift and estate planning options and learn more about how they can benefit you and the causes most meaningful to you, please contact us.



**Baptist Health  
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