

# LEGACY

A FINANCIAL AND CHARITABLE PLANNING GUIDE FOR THE FOUNDATION FOR BARNES-JEWISH HOSPITAL



Paul Ripley, at 86-years young, with one of his award-winning photographs. Paul's deep gratitude and respect for the medical advances that prolonged his life inspired him to leave a gift in his will to The Foundation for Barnes-Jewish Hospital.

## Investing in Medical Research Saves Lives

In 1948, when Paul Ripley—a retired educator and award-winning photographer—was just 18 years old, his father began experiencing severe heart pain. At the time, there weren't any effective treatments for the condition.

“Back then, there was no open-heart surgery,” Paul says. “There was nothing to do but sit there and watch my father die.” Years later when Paul started experiencing his own heart problems, medical research had advanced—and leading-edge treatments saved his life.

“I have no right to be this old,” says Paul, who is 86. “But I've turned to medicine. It seems like any time I had a problem, the treatment—a new medicine or new procedure—came out when I really needed it. Because of that, I have a deep, deep respect for medical research and wanted to pay it forward to The Foundation for Barnes-Jewish Hospital.”

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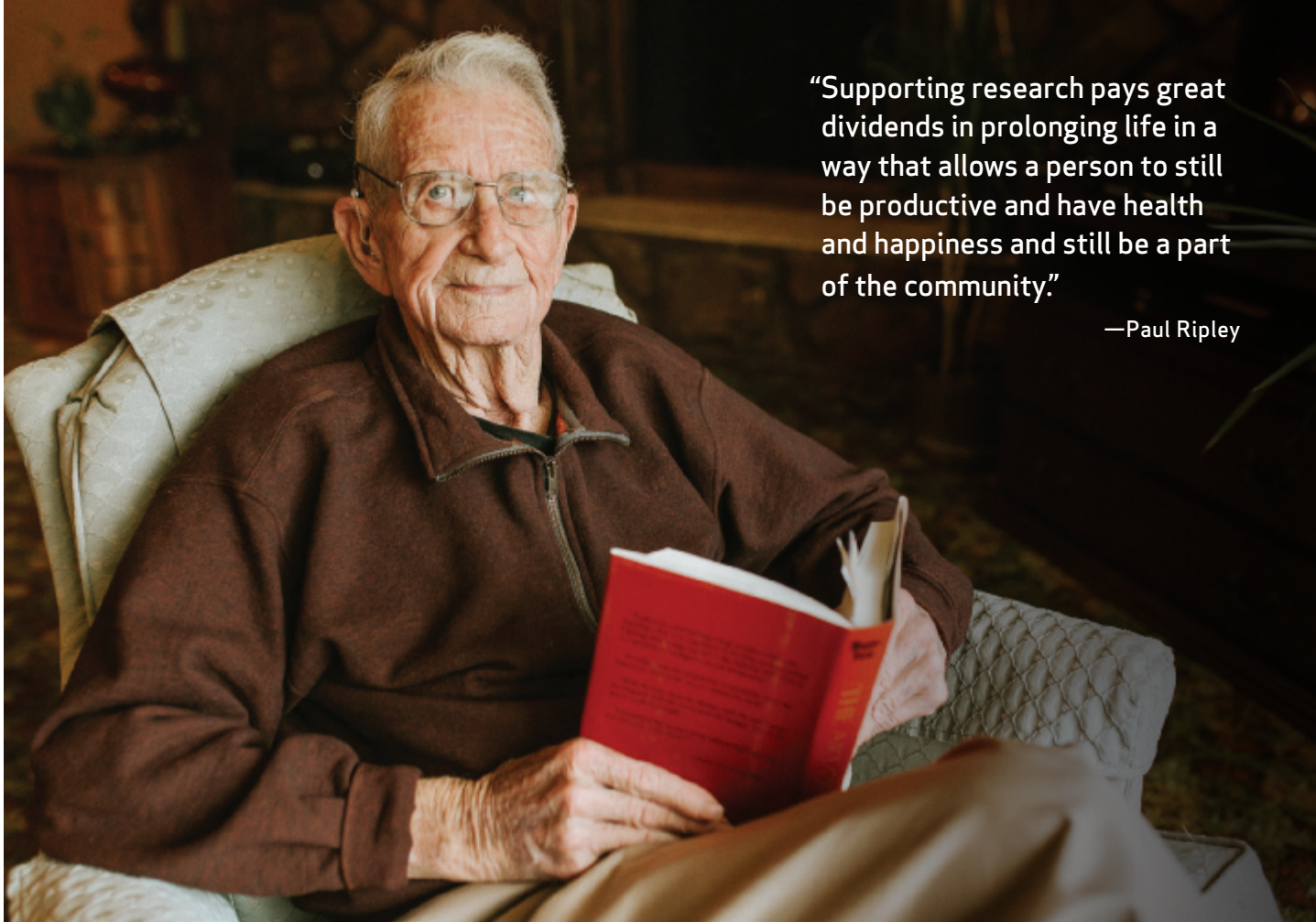
—Paul Ripley

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### Research Progress...Right on Time

In 1977, Paul was one of the first patients in the country to undergo a bypass surgery in Cleveland, Ohio. He later had an additional bypass surgery. By 2006, he was suffering from congestive heart failure, but scar tissue from previous procedures made surgery extremely difficult, if not impossible.

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—Paul Ripley

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He was referred by his local physician to Barnes-Jewish Hospital where Hersh Maniar, MD, a Washington University cardiothoracic surgeon, successfully performed the complicated surgery in 2010.

“Dr. Maniar and the rehabilitation specialists gave me life,” Paul says. “They gave me a psychological and physical return to humanity. I was luckier than my father because of research that had been done that saved my life when I was dying. We couldn’t do anything for him, but medical research progressed right on time and my life was saved.” His deep gratitude and respect for the research that made

these advances possible inspired him to leave a gift in his will to the Foundation.

His generous gift will ensure that heart and vascular physicians at Barnes-Jewish will continue to lead the field in research to develop new treatments to benefit future generations of patients like Paul and his father.

“I consider my giving to be an investment,” Paul says. “Supporting research pays great dividends in prolonging life in a way that allows a person to still be productive and have health and happiness and still be a part of the community.”

## IMPROVE PATIENTS’ LIVES

You can promote the leading medical research and discoveries that prolong and enhance patients’ lives. Please contact Joan Cheaney at 314-286-0704 or [joan.cheaney@bjc.org](mailto:joan.cheaney@bjc.org) to learn more today.

# How to Give in Times of Change

Whether you're transitioning to retirement, adjusting to a new living situation, or dealing with a health issue or other major life event, you're probably feeling some uncertainty about how you're going to adjust to the changes. Will you have the financial security to take care of yourself and your family until life gets "back to normal"?

The same can be said about your charitable giving. When your financial situation changes, but you still want to support the organizations and causes closest to your heart, you look to gifts that won't affect your spending today, but will have an impact well into the future.

The solution? A planned gift. Planned gifts of all sizes can make a big difference in advancing the future of medical research. Here are a few simple ways you can give to The Foundation for Barnes-Jewish Hospital during times of change:

- **Include The Foundation for Barnes-Jewish Hospital in your will or trust.** This is an easy and flexible way to extend your support. You can give a specific amount or leave a percentage of your estate. As little as one sentence in your will is all it takes to complete your gift. Contact Joan Cheaney at 314-286-0704 or [joan.cheaney@bjc.org](mailto:joan.cheaney@bjc.org) to receive language you can use to include a gift to the Foundation in your will or trust.
- **Donate retirement plan assets.** By making a simple designation on your plan's beneficiary designation form, you can save your heirs from a significant tax burden while making an impact on patients' lives.
- **Donate a life insurance policy.** You can donate a no-longer-needed policy or simply name The Foundation for Barnes-Jewish Hospital as the beneficiary.



## ADVANCE THE FUTURE OF MEDICAL RESEARCH

By making a planned gift, you ensure that leading medical research continues far into the future. Contact Joan Cheaney at 314-286-0704 or [joan.cheaney@bjc.org](mailto:joan.cheaney@bjc.org) to learn more about the impact your gift can make at The Foundation for Barnes-Jewish Hospital.



## GIVE IN THEIR NAME

Create a lasting tribute to someone special by making a gift in his or her name to The Foundation for Barnes-Jewish Hospital. Learn the details in our new guide *Give From the Heart With a Tribute Gift*. Simply return the enclosed reply envelope to get started today.

# Get a Jump on 2018

## Cross Estate Planning Off Your To-Do List

In just a few short months, a new year will offer a fresh start on your personal goals and resolutions. It's also the perfect time to take stock of where you are in your estate planning.

### When surveying your plan, make sure you review the following:

- **Wills and trusts.** Review your will or trust for any life change such as a birth, death, marriage, or a move to a different state.
- **Beneficiary designations.** Remove any beneficiary on your life insurance or retirement plans who is deceased or is a former spouse, and consider adding a charitable organization like The Foundation for Barnes-Jewish Hospital.
- **Durable power of attorney.** Make sure your durable powers of attorney for financial matters and health care are current. A copy of the financial power of attorney should be given to your family members, while a copy of your health care power of attorney

should be provided to both family members and health care providers.

- **Safe-deposit box.** Catalog the contents of your safe-deposit box. Give a written copy to a trusted family member and note any items you are holding for someone else.
- **Bank or brokerage accounts.** Name designated heirs or The Foundation for Barnes-Jewish Hospital as recipients of bank or brokerage account proceeds at your death.\*
- **Charitable contributions.** If you've included a gift to The Foundation for Barnes-Jewish Hospital in your estate plan, review the details and let the Foundation—and your loved ones—know of your intentions. This will guarantee that your wishes are carried out after your lifetime.

\*State laws govern payable-on-death accounts and transfer-on-death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.

### NEED HELP?

If you have questions about your estate plan or how you can support The Foundation for Barnes-Jewish Hospital with a tax-wise gift this year or through your estate, please contact Joan Cheaney at 314-286-0704 or [joan.cheaney@bjc.org](mailto:joan.cheaney@bjc.org). We are happy to help.



Contact **Joan Cheaney**, Manager of Planned Giving

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If you no longer wish to receive communications from The Foundation for Barnes-Jewish Hospital, or if you have a change of address, please call 314-286-0442 or email [GivingBarnesJewish@bjc.org](mailto:GivingBarnesJewish@bjc.org). The Foundation for Barnes-Jewish Hospital was formed in Missouri.